NEW SOCIETY

NINTH EDITION

ROBERT BRYM

NINTH EDITION

NEW SOCIETY

ROBERT BRYM
University of Toronto

NELSON

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by Robert Brym

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For my students — RB

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Reginald W. Bibby is one of Canada's leading experts on religion and social trends. He is Professor of Sociology at the University of Lethbridge. For more than four decades, he has been monitoring social trends through his *Project Canada* national surveys of adults and teenagers, recently in partnership with Angus Reid. Dr. Bibby has presented his findings in academic settings around the world. He also has taken his work well beyond the academic community through innumerable public appearances, extensive media exposure, and 17 books with sales of more than 160 000 copies. They *include The Emerging Generation* (Toronto: Irwin, 1985), *Fragmented Gods* (Toronto: Irwin, 1987), *Mosaic Madness* (Toronto: Stoddart, 1990), *Social Trends Canadian-Style* (Toronto: Stoddart, 1995), *Canada's Teens* (Toronto: Stoddart, 2001), *Restless Gods* (Toronto: Stoddart, 2002), *The Boomer Factor* (Toronto: BPS Books, 2006), *Resilient Gods* (Vancouver: UBC Press, 2017), and *The Millennial Mosaic* (Toronto: Dundurn Press, 2019). In recognition of his contribution to the nation, the Governor-General appointed him an Officer of the Order of Canada in 2006.

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Her book, *How the Religious Right Shaped Lesbian and Gay Activism*, examines the rise of the anti-LGBT religious right in the United States and traces over time how LGBT activists reshaped their movement in response to the threat of this opposing movement. Her most recent project examines the social organization of sexual behaviour and its intersection with social and political attitudes.

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NEIL GUPPY

Neil Guppy is Professor of Sociology at the University of British Columbia. He is a graduate of Queen's University (BA/BPHE) and the University of Waterloo (MSc/PhD, 1981). He has published several books, including *Education in Canada* with Scott Davies; *The Schooled Society*, 3rd ed., with Scott Davies; and *Successful Surveys*, 4th ed., with George Gray. Recently, he has published work in the *American Sociological Review*, *Canadian Public Policy*, and *International Migration Review*. At UBC, he has received both a University Killam Teaching Prize and a University Killam Research Prize.

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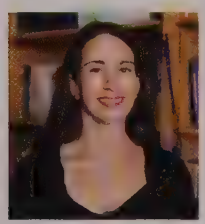
Karen Kobayashi is Associate Professor in the Department of Sociology and a Research Affiliate at the Institute for Aging and Lifelong Health at the University of Victoria. She is a social gerontologist who uses a life-course perspective to explore the intersections of structural, cultural, and individual factors/experiences affecting health and aging in the Canadian population. She has published widely in the areas of family and intergenerational relationships, ethnicity and immigration, dementia and personhood, and health and social care. Her current research examines the social, economic, cultural, and health dimensions of an aging population, focusing on (1) the development of resources to address elder abuse in ethnocultural minority communities; (2) the facilitation of access to health and social care services and programs for ethnocultural minority immigrant older adults; and (3) new and emerging family forms and the implications of changing family relationships for social support and care in later life.

HARVEY KRAHN

Harvey Krahn is Professor of Sociology at the University of Alberta. His primary research interests include social

inequality, the sociology of work, and the sociology of education. He typically uses quantitative research methods but has also participated in studies employing qualitative and historical methods. His largest research project involves interviewing a sample of 400 individuals 8 times over 32 years (from age 18 to age 50) to learn about transitions through the life course and how social inequality is reproduced across generations. He is one of three co-authors of a textbook on the sociology of work (*Work, Industry, and Canadian Society*, 8th ed. Toronto: Nelson, 2020) and has published research findings in a wide range of scholarly journals.

MICHELLE MAROTO



Michelle Maroto is Associate Professor of Sociology at the University of Alberta. Her teaching and research interests centre on social stratification and extend to gender and family, race and ethnicity, criminology, economic sociology, labour and credit markets, and disability. Her recent projects, most of which employ quantitative methods, focus on the causes and consequences of bankruptcy, wealth disparities in the United States and Canada, the effects of incarceration on wealth, and labour market outcomes for people with different types of disabilities. These projects bring together her broader interests in processes of economic insecurity and cumulative disadvantage.

MARGARET J. PENNING

Dr. Penning's research focuses on the sociology of health and healthcare as well as aging. In particular, she is interested in examining structural inequalities in health and healthcare; social support and caregiving; and the importance of self, informal, and formal care for dealing with chronic illness and disability in middle and later life. She is currently conducting research on the impact of caregiving as well as immigrant status, gender, and race intersections on mental health and well-being in middle and later life.

VIC SATZEWICH

Vic Satzewich is Professor of Sociology at McMaster University and Past President of the Canadian Sociological Association. His most recent books include *Points of Entry: How Canada's Immigration Officers Decide Who Gets In*; *"Race" and Ethnicity in Canada: A Critical Introduction*; *Racism in Canada*; *Transnational Identities and Practices in Canada*; and *The Ukrainian Diaspora*. In 2005, he received the Outstanding Contribution Award of the Canadian Sociological Association. *Points of Entry* won the Canadian Sociological Association's John Porter Tradition of Excellence Book Award in 2016.

LISA STROHSCHEIN

Lisa Strohschein (rhymes with *sunshine*) was born in Ontario and received her PhD at McMaster University in 2002. She is a full Professor in the Department of Sociology at the University of Alberta. In her research, she investigates how family dynamics are related to health and well-being, with a focus on the impact of divorce on adults and children. In her spare time, she likes to garden, cook, and travel.

JULIAN TANNER

Julian Tanner is Professor of Sociology at the University of Toronto. His interest in the sociology of crime and deviance, particularly youth crime and youth culture, derives from his school days in England—as both a student in an all-boys boarding school and, later on, as a secondary schoolteacher. In addition to undergraduate and graduate courses in crime and deviance, he has taught and researched in the areas of school-to-work transitions (high-school dropouts, the effects of part-time jobs, and so on), the sociology of work (the industrial and political attitudes and behaviours of male manual workers, gender and the professions),

young people, and popular music. In the recent past, he has studied patterns of crime and victimization among young people in Toronto and youth gang activity, and is currently investigating youth and guns.

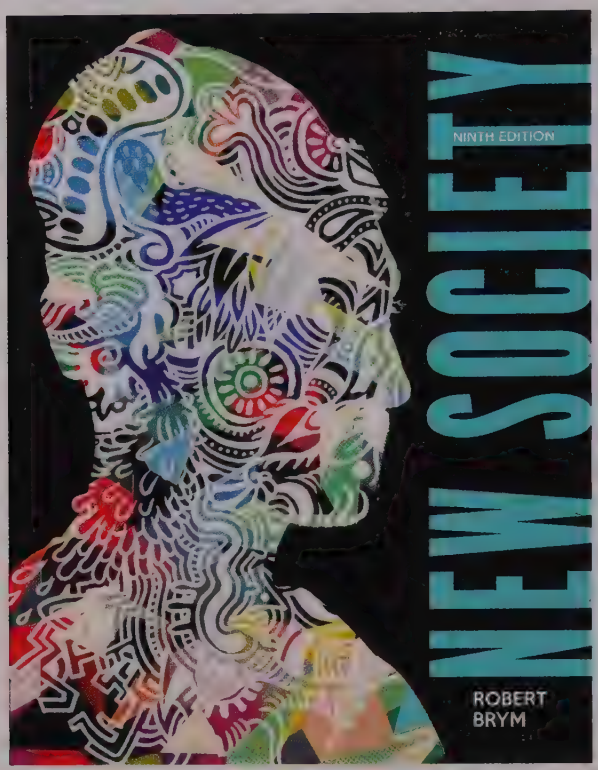
ANTHONY WINSON

Anthony Winson's research and publications have focused on agriculture, food, and rural development issues related to Canada and the developing world. He is the author of *Coffee and Democracy in Modern Costa Rica*, *The Intimate Commodity: Food and the Development of the Agro-Industrial Complex in Canada*, and *Contingent Work, Disrupted Lives: Labour and Community in the New Rural Economy*, with Belinda Leach. *Contingent Work* won the 2003 John Porter Tradition of Excellence Book Award of the Canadian Sociology Association. He recently co-edited (with M. Koc and J. Sumner) *Critical Perspectives in Food Studies*. His latest book is *The Industrial Diet: The Degradation of Food and the Struggle for Healthy Eating*. He is currently researching the relationship of sustainable seafood certification programs to the Canadian retail and food supply sector. See his website at www.theindustrialdiet.com and Twitter account @industrialdiet.

MARISSA YOUNG

Marisa Young is Assistant Professor in the Department of Sociology at McMaster University. She specializes in research on the work–family interface and gender differences in paid and unpaid work. She is currently working on a series of cross-sectional and longitudinal projects in Canada and the United States, examining how family and community contexts shape expectations of work and family obligations. Her recently published research examines the impact of workplace resources/demands on work–family role-blurring; gender differences in experiences and family-related consequences of work–family conflict; and the psychosocial determinants of perceived demands in the work–family interface. Her future research plans include exploring how neighbourhood context impacts work–family relations and well-being among family members.

PREFACE



The job of figuring out what to do with our lives and how to act in the world is more difficult than ever. Sociology helps by analyzing the pressing social issues of the day, showing how those issues affect us, and setting out options for dealing with them. Moreover, as you will learn in the following pages, sociology views social issues from a unique disciplinary perspective. All in all, it is a controversial and exciting business. Social problems are typically complex. The options for action often involve different benefits and disadvantages for different groups. Sociologists usually see things differently than do other social and natural scientists. Not surprisingly, therefore, sociology, like any vibrant academic discipline, involves a lot of heated debate.

Unfortunately, most introductory sociology textbooks don't give much of a feel for the excitement of the discipline. They usually resemble encyclopedias full of definitions and presumably undeniable facts. They make sociological knowledge resemble the tablets some people say were brought down by Moses from Mount Sinai: abstract principles carved in stone, eternal truths that most people agree with but that tell us little about the way life is actually lived.

In preparing this book, I tried to overcome this deficiency in two ways. First, when I recruited authors to write chapters, I asked them to focus on social issues that are likely to be of real, everyday concern to Canadian undergraduates. Second, I asked the authors to highlight the controversies in the field, not the clichés. There is no sense keeping secret what any good scientist knows: Advances in knowledge usually result from intellectual conflict, not consensus.

WHAT'S NEW IN THE NINTH EDITION

With the helpful feedback of reviewers and a dedicated team of contributors, this ninth edition has been thoroughly revised and updated to include important emergent topics in the field of sociology. These topics include the following:

- Governments and big data
- Intersectionality theory
- Advertising and identity
- Precarious work
- Legalization of cannabis
- Cycles of democracy and reaction
- Polyamory and the law

Beyond this comprehensive update, the chapters have undergone the following enhancements:

- **Chapter 1, Introducing Sociology**, includes a new opening vignette exploring the promise of sociology as seen through the eyes of an Indigenous sociologist, a new Critical Sociology feature on Dysfunctional Religion, new material on mesostructures, and an expanded discussion of the sociological imagination.
- **Chapter 2, Research Methods**, features new material on racial profiling in police search and arrest practices, an updated discussion of parental education and the likelihood of attaining a university degree, and a new Critical Sociology feature on governments and big data.
- **Chapter 3, Culture**, incorporates new discussions of childhood socialization, residential schools, and language loss among Indigenous Canadians. The chapter also contains new material on the Internet and social media, hip-hop, and a new Critical Sociology feature, Control and Creativity on the Internet.
- **Chapter 4, Socialization**, features updated discussions of the age of retirement and emerging adulthood as a new stage in the life course. The chapter also contains a new discussion about Generation Z and a new Critical Sociology feature, Must I Be My Age?
- **Chapter 5, Genders and Sexualities**, is an entirely new chapter. It takes on the task of explaining variation in genders and sexualities and showing how genders and sexualities intersect with ethnicity, indigeneity, race, and class, making some people more vulnerable than others to inequalities at work and in families. The chapter includes two new Critical Sociology features, Trans Women of Colour Spark the Modern LGBTQ Movement and Intersectionality and Missing and Murdered Indigenous Women and Girls.
- **Chapter 6, Communication and Mass Media**, has been updated to include the most recent examples of how social movements, including the #MeToo movement, are influenced by social media. The chapter also features a new discussion of cyberbullying, enhanced coverage of frames and frame analysis, and a new Critical Sociology feature, Advertising and Identity.
- **Chapter 7, Social Stratification**, expands the discussion of racism, discrimination, and Indigenous people. It also incorporates new material on panhandling and the Safe Streets Act, and two new Critical Sociology features dealing with precarious work and Canada's commitment to social housing.
- **Chapter 8, Race and Ethnic Relations**, expands the discussion of ethnic relations in Quebec, paying special attention to Islamophobia and anti-immigrant sentiment in that province. It also expands and updates the discussion of police racism and carding, and provides illustrative examples from Thunder Bay, Ontario. The discussion of murdered and missing Indigenous women and girls has also been expanded, and new material has been added on the racial wage gap, transnational ethnic ties, and the Black Lives Matter movement.
- **Chapter 9, Development, Underdevelopment, and Globalization**, adds material on the impact of U.S. nuclear bomb testing on the inhabitants of the Marshall Islands in the South Pacific and the devastation of Canada's Indigenous population caused by diseases introduced by European fur traders. The chapter also includes a new Critical sociology feature on globalization and work.
- **Chapter 10, Families**, is an entirely new chapter. Instead of a traditional definition of family, which focuses on the roles played by family members, it adopts a "process" definition that draws attention to the social processes taking place in families. The result of this shift of focus is a superior understanding of the wide variety of family types that exist in contemporary society.

- **Chapter 11, Education**, features new material on credential inflation and its side effects and recent controversies concerning the quality of higher education in Canada. The chapter also includes a new Critical Sociology feature on the use of digital technology in the classroom.
- **Chapter 12, Religion**, introduces a new discussion of personal religiosity in Canada, especially among Millennials, and new material on religious identification among Indigenous Canadians. The chapter also features a new Critical Sociology feature on residential schools.
- **Chapter 13, Deviance and Crime**, discusses sexual assaults at St. Michael's College school in Toronto in the context of hypertoxic masculinity, as well as an evaluation of laws governing prostitution. The chapter also includes new material on solitary confinement and on the legalization of cannabis in Canada.
- **Chapter 14, Health and Aging**, includes new discussions of conventionally defined beauty standards and health, elder abuse, and mental health. In addition, the chapter features a new Critical Sociology feature, Free Trade and State Regulation of Prescription Drug Prices: Who Wins and Who Loses?
- **Chapter 15, Politics and Social Movements**, features a new Critical Sociology feature on cycles of democratic progress and reactionary setback that sheds sociological and historical light on current political developments in Canada and internationally.

ORGANIZATION OF THE TEXTBOOK

Chapter 1, Introducing Sociology, by Robert Brym, strikes the book's keynote. Instead of sermonizing on the question "What is sociology?" as most other textbooks do, the chapter asks, in effect, "Why sociology?"—that is, why does an undergraduate in this particular time and place need to know what sociology has to offer? The chief aim of Chapter 1 is to show how sociological thinking can clarify and help to resolve the real-life social issues that confront all of us here and now.

Chapter 2, Research Methods, concisely outlines how sociologists work. Neil Guppy's clarity, research experience, and balanced approach add much-needed lustre to the subject. Guppy leaves the reader with the firm sense that, for all the intellectual liveliness and controversy on display in this book, sociology can be and is disciplined by the judicious use of logic and evidence.

The remainder of the book is divided into four parts. **Part 2** could be subtitled "Becoming Human." In **Chapter 3**, Culture, Robert Brym makes a case for the view that ours is an increasingly fragmented and globalized postmodern culture that increases our freedom to fashion identities that suit our individual tastes. Paradoxically, however, he also shows that our increased cultural freedom develops within definite limits beyond which it is more and more difficult to move.

In **Chapter 4**, Socialization, Lisa Strohschein discusses the interactive mechanisms through which we learn beliefs, symbols, values, and self-identities throughout the life cycle and in various institutions.

Tina Fetner and Marisa Young then devote **Chapter 5**, Genders and Sexualities, to an in-depth analysis of what might seem to be the most intimate, fixed, and biologically determined aspects of our identity but actually vary by social, cultural, and historical context.

In **Chapter 6**, Communication and Mass Media, Sonia Bookman dissects the impact of one of the most pervasive and influential social institutions. Bookman, along with the other Part 2 authors, thus give the reader a solid appreciation of how we become part of society and how society becomes part of us through the transmission of culture between generations.

Part 3 concerns how people become and remain unequal. In **Chapter** 7, Social Stratification, Michelle Maroto and Harvey Krahn show that despite recent assertions of the demise of social classes, stratification persists and continues to structure Canadians' lives. Indeed, inequality is increasing in many societies, including Canada.

Vic Satzewich devotes **Chapter 8**, Race and Ethnic Relations, to highlighting the deficiencies of biological and purely cultural approaches to understanding the bases of ethnic and racial inequality, emphasizing their sociological underpinnings in the Canadian context.

Anthony Winson criticizes modernization and other theories of economic underdevelopment and global inequality in **Chapter 9**, Development, Underdevelopment, and Globalization. He offers a compelling argument for the analytical benefits of a modified dependency approach to the problem. As

a result, the reader will complete Part 3 with a firm understanding of how people are highly differentiated and differentially rewarded, depending on their social and historical location.

Part 4 shifts the reader's attention to some of society's fundamental institutions. **Chapter 10**, Families, by Amber Gazso and Karen Kobayashi, examines how and why families and intimate relationships have undergone change and diversification, particularly in the past several decades, and suggests where they may be headed. They argue that families are sets of social processes, not just ensembles of roles, allowing them to highlight the wide diversity of family forms that exist in today's society.

Scott Davies analyzes our education system in **Chapter 11**, Education. Paradoxically, he demonstrates that the educational system is as much a cause of the persistence of inequality as it is an avenue for upward mobility.

In **Chapter 12**, Religion, Reginald Bibby assesses the social origins, consequences, and future of religion, relying heavily on his own important survey research to argue his case for the persistence of religion in Canadian society and the growing polarization of Canadians into religious and secular camps.

Change and conflict are the subjects of **Part 5**. Here the reader is introduced to the main forces of turbulence in our society. In **Chapter 13**, Deviance and Crime, Julian Tanner elegantly analyzes one form of social conflict: deviant and criminal behaviour. He undermines several common misconceptions in the process.

In **Chapter 14**, Health and Aging, Margaret Penning expertly discusses the aging of the Canadian population and its attendant health issues, keeping her eye steadily on the policy implications of current research.

Finally, in **Chapter 15**, Politics and Social Movements, Robert Brym surveys the evolution of politics and social movements, showing how various forms of conflict emerge, change our lives, and become institutionalized.

FEATURES OF THE NINTH EDITION

The content and organization of this text have been carefully prepared, and you will find updated visual and pedagogical features in this ninth edition of *New Society.*

NEW PART OPENERS

Students and instructors alike will appreciate the unique illustrations that enliven the cover and part openers. These illustrations were created by Aaron Millard, a graduate of OCAD University in Toronto, and were designed to engage students with the important themes in the book.

Additionally, new chapter objectives presented at the beginning of each chapter prepare students to think critically and to absorb the material.

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Appreciate the degree to which social interaction unleashes human abilities, including the ability to see oneself as different from others.
- Evaluate how stages in life are influenced by the historical period in which people live.
- Contrast the declining socializing influence of the family with the rising socializing influence of schools, peer groups, and the mass media over the past century.
- Compare the greater speed, frequency, and comprehensiveness of identity change today with the lower speed, frequency, and comprehensiveness of identity change just a few decades ago.

CRITICAL SOCIOLOGY FEATURES

Created to further engage students and reflect the critical approach of the text, there are 30 **Critical Sociology** features in the book, 18 of which are new to this edition. These features cover key themes such as globalization, protest and policy, and social inequality.

A set of **Critical Thinking Questions** is provided at the end of each feature, and answers/points to consider for these questions are provided on the student Companion Website at www.nelson.com/student.

Critical Sociology BAD POLICING OR RISKY BEHAVIOUR?

The 2014 RCMP report *Missing and Murdered Aboriginal Women* is disturbing reading. The report notes that between 1980 and 2012, 1181 Indigenous women were homicide victims. Making up about 4 percent of Canada's female population, they comprised 16 percent of all murdered Canadian women over that period. Moreover, the situation seems to be getting worse. In 1984, Indigenous women were 8 percent of female homicide victims, but by 2012 that figure had climbed to 23 percent (Royal Canadian Mounted Police, 2014: 7–10). The report also showed that there were 164 missing Indigenous women, then constituting about 11 percent of all missing women in the country (Royal Canadian Mounted Police, 2014: 8).

The causes of crime are complex, as are the reasons why some people go missing. The RCMP report identifies three "risk factors" that contribute to the high rate of victimization of Indigenous women: poor employment conditions and opportunities; the consumption of drugs, alcohol, or other intoxicants prior to the incident; and involvement in the sex trade (Royal Canadian Mounted Police, 2014).

The RCMP report followed on the heels of another report by the Special Parliamentary Committee on Violence against Indigenous Women. The Committee report tried to place the problem in a larger social and historical context. It argued that the "root causes" of violence against Indigenous women include the legacy of Indigenous children being removed from their families and their culture by the government and placed in church-run boarding schools; persistent poverty and poor housing conditions; and widespread racism in Canadian society (House of Commons, 2014).

Not everyone was pleased with the RCMP report because it was silent on the larger context contributing to violence against Indigenous women. Some people called the Special Committee's report a whitewash because of its timid recommendations for improving the situation; rather than demanding a national inquiry and a comprehensive national action plan, the committee merely recommended that the federal government "learn from the stories of missing and murdered Indigenous girls and work . . . to create a public awareness and prevention campaign focusing on violence against Indigenous women and girls in Canada" (Special Committee on Violence Against Indigenous Women, 2014: 43).

According to Human Rights Watch (a nongovernmental agency that monitors human rights abuses around the world), one of the glaring silences in both reports concerns the role that the police may play in the victimization of Indigenous women. Human Rights Watch (2013) argues that a big part of the problem is that police do not take the issue of violence against Indigenous women seriously. To support their claim, they document cases in which Indigenous women are sexually and racially abused by the police.

In September 2016, the federal government launched a National Inquiry into Missing and Murdered Indigenous Women and Girls. Its mandate is to

> . . . look into and report on the systemic causes of all forms of violence against Indigenous women and girls, including sexual violence. We must examine the underlying social, economic, cultural, institutional, and historical causes that contribute to the ongoing violence and to particular vulnerabilities of Indigenous women and girls in Canada (National Inquiry into Murdered and Missing Indigenous Women and Girls, 2019).

The main work of the inquiry has been to cross the country gathering stories of survivors and families of victims in the hope that public education will help spark more dialogue about how to curtail the violence. One can only hope that their reports and recommendations will not gather dust on politicians' shelves.

Critical Thinking Questions

1. From an investigative point of view, do police agencies take cases of missing Indigenous women as seriously as those of non-Indigenous women?
2. What changes should police forces make to better address the issue of murdered and missing Indigenous women and young girls?

FIGURES, TABLES, AND IN-CHAPTER LEARNING AIDS

Current census data and other up-to-date research is easily compared when presented in one of over 20 tables and 50 figures integrated throughout the book to enhance student learning—30 of these figures are completely new.

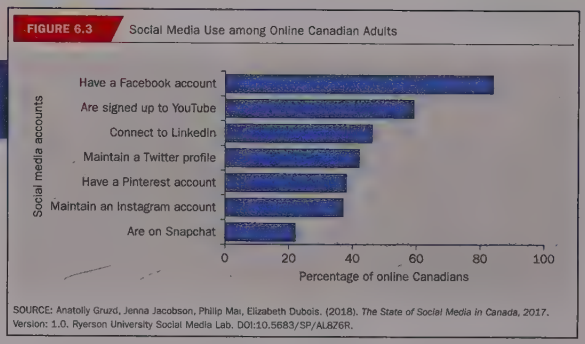


FIGURE 6.3
Social Media Use among Online Canadian Adults
Have a Facebook account
Are signed up to YouTube
Connect to LinkedIn
Maintain a Twitter profile
Have a Pinterest account
Maintain an Instagram account
Are on Snapchat
Social media accounts
0
20
40
60
80
100
Percentage of online Canadians
SOURCE: Anatolly Gruzd, Jenna Jacobson, Philip Mai, Elizabeth Dubois. (2018). The State of Social Media in Canada, 2017. Version: 1.0. Ryerson University Social Media Lab. DOI:10.5683/SP/AL8Z6R.

Time for Review questions found at the end of important sections in each chapter balance provocative questions with factual recall.

TIME FOR REVIEW

1. Contrast ethnocentrism and cultural relativism. How is it possible to avoid both extremes?
2. What are the major forces that have led to cultural diversification and greater freedom to make cultural choices since World War II?
3. In what sense is Canada the first truly post-modern country?

SUMMARY

1. **What is democracy and what determines the level of democracy in a society?**
Democracy involves a two-way process of control between the state (the set of institutions that formulate and carry out a country's law, policies, and binding regulations) and civil society (the private sphere, consisting of social movements, political parties, the mass media, and so on). The level of democracy in a society depends on the capacity of civil society to influence the state through citizen support of social movements, political parties, and other groups. That capacity increases as

associated with the success of labour parties and policies that redistribute wealth.

4. **Under what circumstances do people rebel against established authority?**
Research does not support the view that social movements emerge when relative deprivation spreads. Research suggests that people are more inclined to rebel against the status quo when they are bound by close social ties to many other people who feel similarly wronged and when they have the money and other resources needed to protest.

QUESTIONS TO CONSIDER

1. Have you ever participated in a social movement or been actively involved in a political party? If so, explain how your political choices (which party you joined, your level of participation, the timing of your recruitment) were influenced by the sociological factors discussed in this chapter. If you have never participated in a social movement or been actively involved in a political party, explain how the sociological factors discussed in this chapter influence you to remain politically inactive.
2. How would you achieve a political goal? Map out a detailed strategy for reaching a clearly defined

try to recruit to help you achieve your goal? Why? What collective actions do you think would be most successful? Why? To whose attention would these actions be directed? Why? Write a manifesto that frames your argument in a way that is culturally appealing to potential recruits.

3. Do you think that social movements will be more or less widespread in the twenty-first century than they were in the twentieth century? Why, or why not? What kinds of social movements are likely to predominate?
4. Do you think that the twenty-first century will be

GLOSSARY

Authorities (p. 343) are people who occupy the command posts of legitimized power structures.

Authority (p. 343) is power that is widely viewed as legitimate.

Civil citizenship (p. 355) recognizes the right to free speech, freedom of religion, and justice before the law.

Civil society (p. 344) is the private (nonstate) sphere of social life.

Elite theory (p. 345) maintains that well-to-do people consistently have more political influence than people who are less well-to-do have and that society is therefore not as democratic as it is often portrayed.

change. It also holds that societies with widely distributed power are more democratic and more egalitarian than are societies with narrowly held power.

Relative deprivation (p. 352) is an intolerable gap between the social rewards people feel they deserve and the social rewards they expect to receive.

Resource mobilization theory (p. 352) holds that social movements crystallize and succeed in achieving their goals to the degree that they have access to scarce resources, such as money and effective communication facilities.

A **ruling class** (p. 346) is a self-conscious and cohesive group of people, led by corporate executives and owners of big business, who act to advance their

END-OF-CHAPTER RESOURCES

Each chapter concludes with a set of end-of-chapter resources to help students review and apply their knowledge. Our **Summary** format covers key concepts in each chapter in question-and-answer format, which helps students to see the bigger picture and interact with concepts, not just facts. A set of **Questions to Consider** encourages readers to think critically about the material and to apply what they have learned against their own values, ideas, and experiences.

A glossary of key terms and their definitions is also provided at the end of each chapter.

ANCILLARIES

INSTRUCTOR RESOURCES

The Nelson Education Teaching Advantage (NETA) program delivers research-based instructor resources that promote student engagement and higher-order thinking to enable the success of Canadian students and educators. Visit Nelson Education's Inspired Instruction website at nelson.com/inspired to find out more about NETA.

The following instructor resources have been created for *New Society*, Ninth Edition. Access these ultimate tools for customizing lectures and presentations at nelson.com/instructor.

NETA Test Bank

The **NETA Test Bank** was written by Jaime Nikolaou of the University of Toronto. It includes over 1700 multiple-choice questions written according to NETA guidelines for effective construction and development of higher-order questions. Also included are over 300 true/false, 150 short-answer, and 150 essay questions.

NETA PowerPoint

Microsoft® **PowerPoint® lecture slides** for every chapter have been created by Darlene Balandin of Western University. There is an average of 30 slides per chapter, many featuring key figures, tables, and photographs from *New Society*. NETA principles of clear design and engaging content have been incorporated throughout, making it simple for instructors to customize the deck for their courses.

Image Library

The **Image Library** consists of digital copies of figures, short tables, and photographs used in the book. Instructors may use these images to customize the NETA PowerPoint or create their own PowerPoint presentations.

NETA Instructor's Manual

The ***Instructor's Manual*** to accompany *New Society* was prepared by Vicki Nygaard of Vancouver Island University. This manual contains sample lesson plans, learning objectives, suggested classroom activities, and a resource integration guide to give instructors the support they need to engage their students in the classroom.

CUSTOM PUBLISHING OPTIONS

It's your course, why compromise? Nelson Education is making it easier than ever to customize this sociology textbook to create a highly personalized and convenient course resource for your students. Learn how Custom Publishing with Nelson Education can help you teach your course, your way, by visiting nelsoncustom.com.

STUDENT ANCILLARIES

Companion Website

The **Companion Website** provides students with access to suggested answers/points to consider for the Critical Sociology features, flashcards, multiple-choice questions, and the online glossary. Visit nelson.com/student to access it today.

ACKNOWLEDGMENTS

The ninth edition of *New Society* still bears the imprint of Heather McWhinney, Dan Brooks, Megan Mueller, Semareh Al-Hillal, Brad Lambertus, Camille Isaacs, Laura MacLeod, and Maya Castle. They shepherded the book through its first editions, helping to make *New Society* distinctive and highly successful.

For the past year, I have been privileged to work closely with publishing professionals of the highest calibre, all of whom contributed heavily to the successful completion of the ninth edition. In particular, Leanna MacLean worked diligently and with good humour on this complex project, always mindful of the need to balance the diverse needs of instructors, students, and authors. Toni Chahley's energetic and meticulous approach to the project was evident from beginning to end. Visually and linguistically, this book owes much to her exemplary skill as a developmental editor. I would also like to thank Marc-André Brouillard (photo researcher), Jennifer Hare (senior production project manager), Sydney Pope (marketing manager), June Trusty (copy editor), Linda Szostak (proofreader), and Daniela Glass (permissions coordinator).

New Society could not have become what it is without the authors of each chapter. They are among the very best sociologists in Canada. I believe that,

although concentrating on the exposition of their own subfields, they have conveyed to the novice a real sense of the excitement and promise of sociology. I am deeply indebted to them, as scores of thousands of introductory sociology students and their instructors inevitably have been and will be.

Finally, I would like to thank the reviewers, whose insightful comments helped shape this and previous editions:

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E. Wilma van der Veen, Saint Mary's University
Meng Yu, Memorial University of Newfoundland

R.B.
Toronto

PART 1

INTRODUCTION

Illustrated by Aaron Millard.

CHAPTER 1

INTRODUCING SOCIOLOGY

Robert Brym UNIVERSITY OF TORONTO

David Morin Music & Bombay Records (SOCAN), Every Colour © 2015 Bombay Records, © 2015 David Morin Music. Artwork © Sangito Bigelow

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Define sociology.
- Identify the social relations that surround you, permeate you, and influence your behaviour.
- Describe how sociological research seeks to test ideas and improve people's lives using scientific methods.
- Summarize the main theoretical traditions in sociology.
- Appreciate how sociology emerged out of the Scientific, Democratic, and Industrial Revolutions.
- Understand the main challenges facing society today.

INTRODUCTION

SOCIOLOGY AS A LIFE OR DEATH ISSUE

When I began university at the age of 18, I was bewildered by the wide variety of courses I could choose from. In fact, I was uncertain about why I was in university in the first place. Several high-school teachers and guidance counsellors had told me that university was supposed to "broaden my horizons" and teach me to "think critically." But when I started studying sociology, I discovered that university could also change lives. I know that sounds boastful. The following anecdote by Karen Taylor, a Métis sociologist at a college in Edmonton, may make it seem less so.

> I once chose to die. Not only did it seem like a good idea at the time, it seemed to be the only way out of an intolerable life. I'm still alive some thirty years later, so obviously that decision and the subsequent suicide attempt were not the end of the story. They might be the beginning, though.
>
> Waking up in the hospital some time later (I don't know how much later), I was subjected to what I thought were some very curious reactions. Some people seemed to think that my choices were about them—I did it because I hated them, or I did it to send them a message, or I did it because I wanted to punish them for something. Other people thought it was all about me and how sick I was—I did it because I was mentally unstable, or I did it because my thinking was inherently flawed and I was a danger to myself (and possibly those around me), or I did it as a cry for help. That last one made me laugh—after all, if I had thought at the time that there was help available, it would have been an entirely different story. Wouldn't it?
>
> Life moves on. I moved too. From growing up in a primarily Indigenous community where I did not belong, to living in a primarily white city where I did not belong, I took my inner turmoil with me. At some point, I decided to go back to school. I enrolled in some college courses, one of which was sociology—a course from which I un-enrolled pretty quickly. I most certainly did not want to study sociology, "the study of society." I hated society. Society, I thought, was the loud, dirty, rude crush of people in the city, people who were bewilderingly consistent at making me feel false, excluded, and less than whatever it was that they were.
>
> So I studied psychology, thinking that it might help me understand myself and perhaps others, all those behaviours and thought processes that completely eluded my attempts to make sense out of life. The idea of death still fascinated me, though, so I looked for a course related to dying. And I found one—The Sociology of Death and Dying. "Are you kidding me!?" I thought, but I took it anyway. I am glad I did. I found out that sociology is not (or at least, not just) about studying loud, dirty cities; it is about living (and sometimes dying). *Society* is just a term for how it is that we construct our lives together; studying society helps us know what we are and what we can become. Nothing to be afraid of here, as long as you are willing to learn something new about yourself.
>
> And learn things, I did. I learned that there is an explanation for the confusion I felt about who I was and who I was not—and in learning that, I learned that I was not alone in the world. Lots of bicultural people experience it. This meant that I was not a lone freak—I might have felt like a freak, but I was not alone. More than that, I learned a language to describe my life experiences and I learned to look at those experiences from different perspectives. I also learned that my views on death and my suicide attempt weren't just about me and my pathology; they were about me and other factors in my life: my background, my relationships, my socioeconomic status, my gender, and more. My studies brought me to a place where I can say out loud and without shame: I am Métis, I belong here.

Karen's study of sociology changed her life by clarifying her place in society, how she might best manoeuvre through it, even how she could contribute to improving it. We may not always feel comfortable with our life, but we can use our sociological imagination to understand why we sometimes feel out of place and what we might be able to do about it, alone and with others.

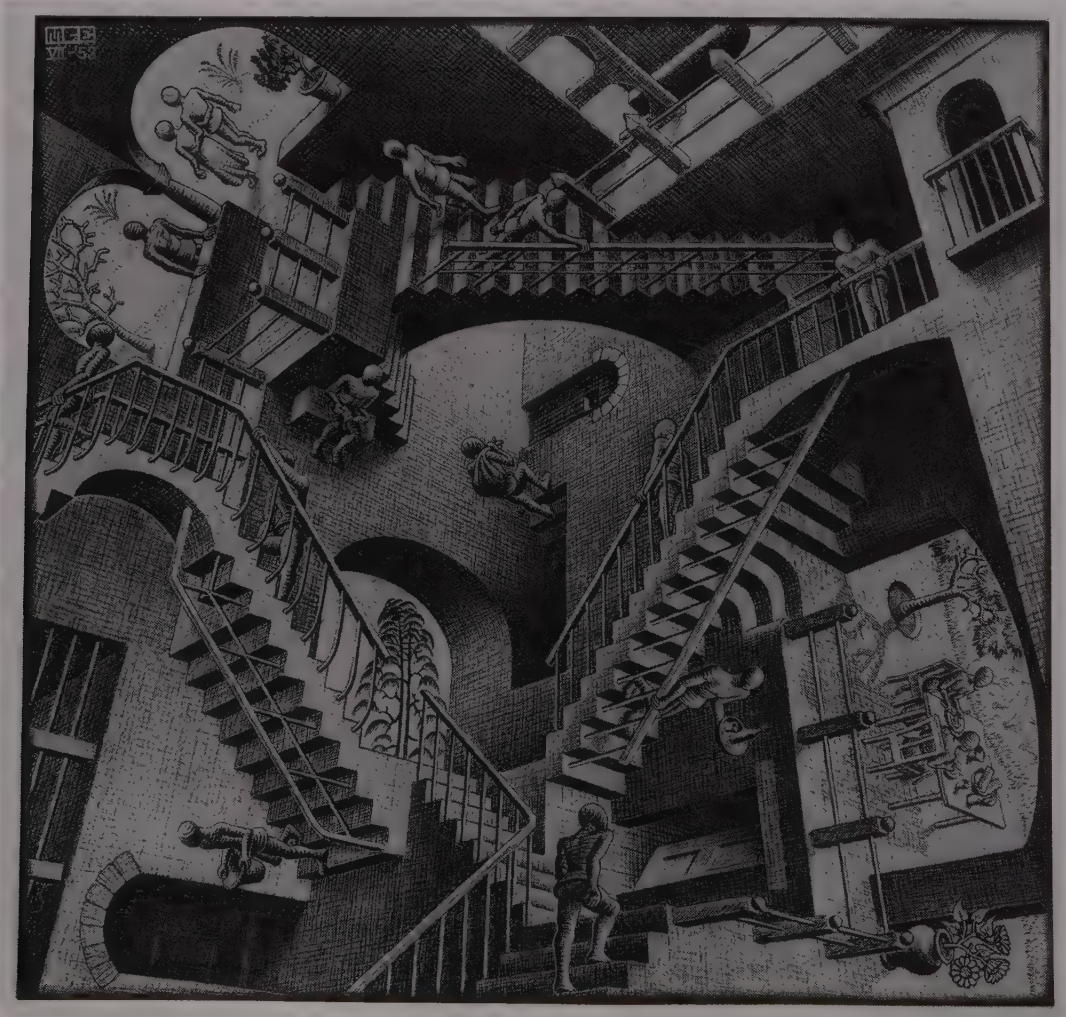
Before attending university, Karen took for granted that things happen in the world—and to each of us individually—because psychological and physical

forces cause them. She might have thought that famine is caused by drought, war by territorial greed, economic success by hard work, marriage by love, suicide by bottomless depression, rape by depraved lust. However, sociology would have thrown evidence in her face that contradicted those easy formulas. If drought causes famine, why have so many famines occurred in perfectly normal weather conditions or involved some groups hoarding or destroying food so that others would starve? If hard work causes prosperity, why are so many hard workers poor? If love causes marriage, why are so many families the site of violence against women and children? If depression causes suicide, why is it that some people can overcome their despair?

The answer is that drought, war, economic success, love, depression, rape, and much else occur in social contexts. Understanding social contexts can help clarify otherwise inexplicable features of famine, marriage, and so on. In public school, you were likely taught that people are free to do what they want with their lives. However, **sociology**—the systematic study of human behaviour in social context—teaches that the organization of the social world opens some doors of opportunity and closes others, thus constraining our freedom and helping to make us what we are. By examining the operation of these powerful social forces, sociology can help us to know ourselves, our capabilities, and our limitations. Once Karen learned this liberating fact, she was hooked. And so, of course, I hope you will be, too.

THE GOALS OF THIS CHAPTER

In this chapter, I want to show how sociology is relevant to you. First, I illustrate the power of sociology to dispel



Life is finite, and if we want to make the most of it, we must figure out how best to live. Sociology offers a useful perspective for understanding our current predicament and seeing possible ways of dealing with it.

SOURCE: M.C. Escher's "Relativity" © 2019 The M.C. Escher Company-The Netherlands. All rights reserved. www.mcescher.com

foggy assumptions and help us see the operation of the social world more clearly. To that end, I examine a phenomenon that at first glance appears to be solely the outcome of breakdowns in individual functioning: suicide. You will see that, in fact, *social relations* powerfully influence suicide rates. This exercise introduces you to what is unique about the sociological perspective.

Second, I show that, from its origins, sociological research has been motivated by a desire to improve the social world. So sociology is not just a dry, academic exercise but a means of charting a better course for society. At the same time, however, sociologists adopt scientific methods to test their ideas, thus increasing the validity of their research. I illustrate these points by briefly analyzing the work of the founders of the discipline.

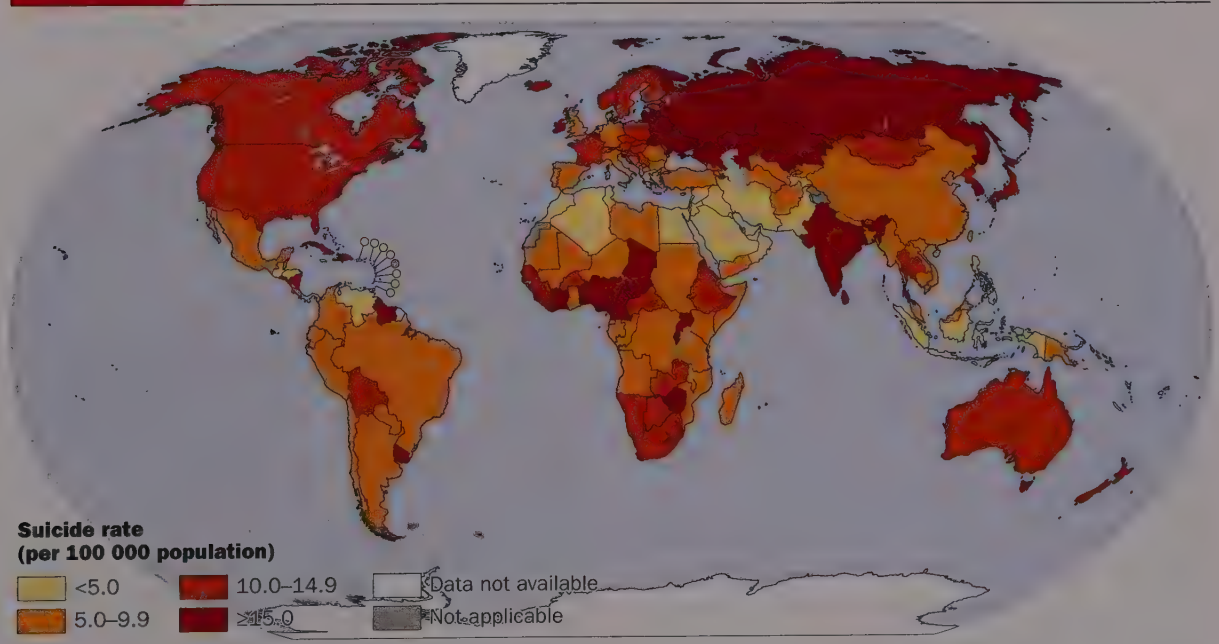
Third, I suggest that sociology can help you come to grips with your century, just as it helped the founders of sociology deal with theirs. Today we are witnessing massive and disorienting social changes. Entire countries are breaking up. Women are demanding equality with men in all spheres of life. Some people are undergoing a religious revival while others are abandoning belief in God. People's wants are increasingly governed by the mass media. Computers are radically altering the way people work and entertain themselves. There are proportionately fewer good jobs to go around. Environmental ruin threatens us all. As was the case a century or more ago, sociologists today try to understand social phenomena and suggest credible ways of improving their societies. By promising to make sociology relevant to you, this chapter should be viewed as an open invitation to participate in sociology's challenge.

But first things first. Before showing how sociology can help you better understand and improve the world, let us briefly examine the problem of suicide. This examination will help to illustrate how the sociological perspective can clarify and sometimes overturn commonsense beliefs.

THE SOCIOLOGICAL PERSPECTIVE

Analyzing suicide sociologically tests the claim that sociology takes a unique, surprising, and enlightening perspective on social events. After all, suicide appears to be an antisocial and nonsocial act. First, it is viewed negatively by nearly everyone in society. Second, it is typically committed in private, far from the public's intrusive glare. Third, it obliterates society, at least for the person committing suicide. Fourth, it is comparatively rare: In 2014, the most recent year for which data are available, there were about 11 suicides for every 100 000 people in Canada (compared with the world average of about 16 suicides per 100 000 people; Statistics Canada, 2016; see Figure 1.1). And,

FIGURE 1.1 Suicide Rate by Country



SOURCE: Reproduced, with the permission of the publisher, from "Age-standardized suicide rates (per 100,000 population) both sexes, 2016," World Health Organization, 2018, at http://www.who.int/mental_health/suicide-prevention/Global_AS_suicide_rates_bothsexes_2016.png?ua=1 (retrieved 15 October 2018).

finally, when you think about why a person commits suicide, you are likely to focus on his or her state of mind rather than on the state of society. That is, we are usually interested in the events that cause individuals to become depressed or angry enough to do something as awful as killing themselves. We do not usually think about the patterns of social relations that might encourage or inhibit such actions. If sociology can reveal the hidden social causes of such an apparently nonsocial and antisocial phenomenon, there must be something to it!

THE SOCIOLOGICAL EXPLANATION OF SUICIDE

At the end of the nineteenth century, French sociologist Émile Durkheim (1951 [1897]), one of the pioneers of the discipline, demonstrated that suicide is more than just an individual act of desperation resulting from psychological disorder, as was commonly believed at the time. He showed that the suicide rate (the number of suicides per 100 000 population) is strongly influenced by social forces.

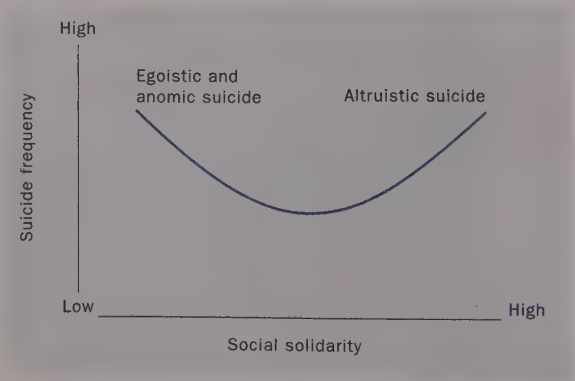
Durkheim made his case by first examining the association between rates of suicide and rates of psychological disorder for different groups. The idea that psychological disorder causes suicide is supported, he reasoned, only if suicide rates tend to be high where rates of psychological disorder are high, and low where rates of psychological disorder are low. However, his analysis of European government statistics, hospital records, and other sources revealed nothing of the kind. He discovered there were slightly more women than men in insane asylums. Yet there were four male suicides for every female suicide. Jews had the highest rate of psychological disorder among the major religious groups in France. However, they also had the lowest suicide rate. Psychological disorders occurred most frequently when a person reached maturity. Suicide rates, though, increased steadily with age.

Clearly, suicide rates and rates of psychological disorder did not vary together. What then accounts for variations in suicide rates? Durkheim argued that suicide rates vary because of differences in the degree of **social solidarity** in different groups. According to Durkheim, the more a group's members share beliefs and values, and the more frequently and intensely the members interact, the more social solidarity a group exhibits. In turn, the more social solidarity a group exhibits, the more firmly anchored individuals are to the social world, and the less likely they are to take their own lives if adversity strikes. In other words, Durkheim expected groups with a high degree of solidarity to have lower suicide rates than do groups with a low degree of solidarity—at least up to a certain point (see Figure 1.2).

In general, Durkheim wrote, "suicide varies with the degree of integration of the social groups of which the individual forms part" (Durkheim, 1951 [1897]: 209). Note that his generalization tells us nothing about why any particular *individual* may take his or her life. That is a question for psychology. But it does tell us that a person's likelihood of committing suicide decreases with the degree to which he or she is anchored in society. And it says something surprising and uniquely sociological about how and why the suicide rate varies from group to group, even today (see Figure 1.3).

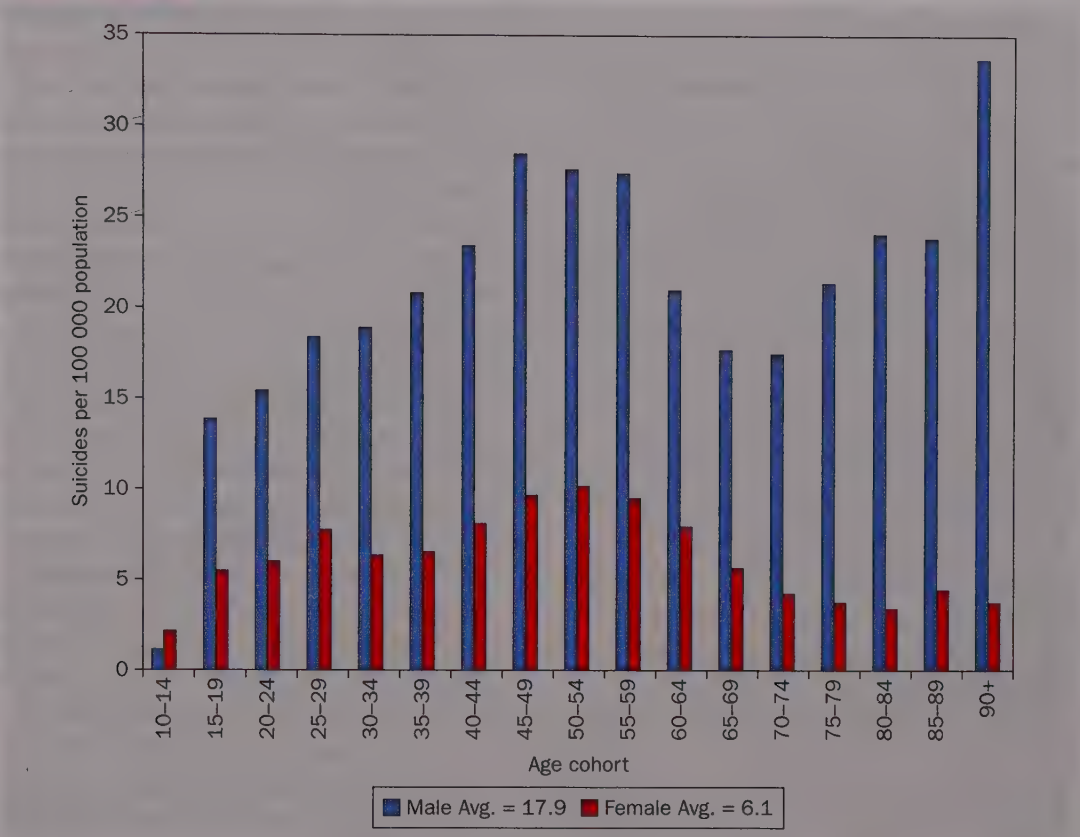
To support his argument, Durkheim showed that married adults are half as likely as unmarried adults to commit suicide. That is because marriage usually creates social ties and a sort of moral cement that bind the individual to society. Similarly, he argued that women are less likely to commit suicide than are men.

FIGURE 1.2 Durkheim's Theory of Suicide



Durkheim's theory of suicide states that the suicide rate declines and then rises as social solidarity increases. Suicide in low-solidarity settings may be egoistic or anomic. **Egoistic suicide** results from the poor integration of people into society because of weak social ties to others. Someone who is unemployed and unmarried is thus more likely to commit suicide than is someone who is employed and married. **Anomic suicide** occurs when vague norms govern behaviour. The rate of anomic suicide is likely to be high among people living in a society that lacks a widely shared code of morality. Durkheim called suicides that occur in high-solidarity settings altruistic. **Altruistic suicide** occurs when norms tightly govern behaviour. Soldiers who knowingly give up their lives to protect comrades commit altruistic suicide out of a deep sense of patriotism and comradeship.

FIGURE 1.3 Suicide by Age and Sex, Canada, 2014



The most recent data on suicide by age and sex in Canada indicate that men are about three times more likely than women to take their own lives, as was the case in Durkheim's France. However, the suicide rate does not increase steadily with age; the suicide rate among teenagers, young adults, and middle-aged people is much higher than it was in Durkheim's France. In fact, the suicide rate among women declines for women over the age of 54, contrary to what Durkheim found.

Be a sociologist: Outline your own explanation for these differences between late nineteenth-century France and early twenty-first-century Canada.

SOURCE: Statistics Canada. (2018). "Leading causes of death, total population, by age group (both sexes)" at http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/hlth36a-eng.htm (retrieved 17 February 2018).

Why? Women are generally more involved in the intimate social relations of family life. Jews, Durkheim wrote, are less likely to commit suicide than Christians are. The reason? Centuries of persecution have turned them into a group that is more defensive and tightly knit. And seniors are more prone than the young and the middle-aged are to take their own lives in the face of misfortune. That is because they are most likely to live alone, to have lost a spouse, and to lack a job and a wide network of friends.

FROM PERSONAL TROUBLES TO SOCIAL STRUCTURES

You have known for a long time that you live in a society. Yet until now, you may not have fully appreciated that society also lives in you. That is, patterns of social relations affect your innermost thoughts and feelings, influence your actions, and thus help shape who you are. As we have seen, one such pattern of social relations is the level of social solidarity that characterizes the various groups to which you belong.

Sociologists call relatively stable patterns of social relations **social structures**. One of the sociologist's main tasks is to identify and explain the connection between people's personal troubles and the social structures in which people are embedded. This work is harder than it may at first seem. In everyday life, we usually see things mainly from our own point of view. Our experiences appear unique to each of us. If we think about them at all, social structures may appear remote and impersonal. To see how social

structures operate inside us, we need to broaden our sociological awareness.

An important step in broadening our sociological awareness involves recognizing that four levels of social structure surround and penetrate us: microstructures, mesostructures, macrostructures, and global structures. Think of these structures as concentric circles radiating out from you.

Microstructures are patterns of intimate social relations. They are formed during face-to-face interaction. Families, friendship circles, and work associations are all examples of microstructures. Understanding the operation of microstructures can be useful. Let's say you are looking for a job. You might think you would do best to ask as many close friends and relatives as possible for leads and contacts. However, sociological research shows that people you know well are likely to know many of the same people. After asking a couple of close connections for help landing a job, therefore, you should ask more remote acquaintances for leads and contacts. People to whom you are weakly connected (and who are weakly connected among themselves) are more likely to know *different* groups of people. Therefore, they will give you more information about job possibilities and ensure that word about your job search spreads farther. You are more likely to find a job faster if you understand "the strength of weak ties" in microstructural settings (Granovetter, 1973).

Mesostructures are patterns of social relations formed in organizations whose members are often not intimately acquainted and who often do not interact face to face. Social organizations such as colleges, bureaucracies, and political parties are examples of mesostructures. Understanding the operation of macrostructures can also be useful. Take political parties in democracies like Canada. People often assume that, in democracies, political parties are "open" in the sense that just about any citizen can join them, and talented members can rise to leadership position within them. However, sociologists have shown otherwise. Most people lack the time, money, education, and connections with the "right" crowd that are needed to rise to the top. As a result, political parties are considerably less democratic that we are often led to believe. Consequently, people who want to become politically influential but lack resources like money and connections must often create organized protest movements that engage in demonstrations, sit-ins, publicity stunts, and so on, to achieve their aim (Lipsky, 1968; Michels, 1962 [1911]).

Macrostructures are patterns of social relations that lie outside and above your circle of intimates and acquaintances and the social organizations you may interact with. They are aspects of whole societies. Macrostructures include class relations and **patriarchy**, the traditional system of economic and political inequality between women and men in most societies.

To understand how macrostructures influence us, consider one aspect of patriarchy. Most married women who work full-time in the paid labour force do more housework, child care, and elder care than their husbands do. Most governments and businesses support this arrangement by providing little assistance to families in the form of affordable, accessible, and high-quality nurseries, after-school programs for children, seniors' support systems, and so on. Yet the unequal division of work in the household is a major source of marital dissatisfaction, especially in families that cannot afford to pay for these services privately. Sociological research shows that when spouses share domestic responsibilities equally, they are happier with their marriages and less likely to divorce (Hochschild and Machung, 1989).

When a marriage is in danger of dissolving, it is common for partners to blame themselves and each other for their troubles. However, it should now be clear that patriarchal forces that have little to do with people's personalities often put stresses on families. Understanding how the macrostructure of patriarchy crops up in everyday life, and doing something to change that structure, can help people enjoy happier marriages.

The fourth level of society that surrounds and permeates us comprises **global structures**. International organizations, patterns of worldwide travel and communication, and the economic relations between countries are examples of global structures. Global structures are increasingly important as inexpensive travel and communication allow all parts of the world to become interconnected culturally, economically, and politically.

Understanding the operation of global structures can be useful, too. For instance, many people are concerned about the world's poor. They donate money to charities to help with famine and disaster relief, and they approve of the Canadian government giving foreign aid to poor countries. However, many of these same people do not appreciate that charity and foreign aid alone cannot end world poverty because they cannot overcome the structure of social

relations among countries that have created and sustain global inequality.

Britain, France, and other imperial powers locked some countries into poverty when they colonized them between the seventeenth and nineteenth centuries. In the twentieth century, the poor (or "developing") countries borrowed money from these same rich countries and Western banks to pay for airports, roads, harbours, sanitation systems, basic healthcare, and so on. Today, poor countries pay far more to rich countries and Western banks in interest on those loans than they receive in aid and charity. Foreign aid equals only about one-tenth of interest payments that poor countries pay to rich countries and Western banks (Jubilee Debt Campaign, 2010: 6; Organisation for Economic Co-operation and Development, 2008: 6). So it seems that foreign aid and charity can do little to help solve the problem of world poverty. Understanding how the global structure of international relations created and helps maintain global inequality suggests new policy priorities for helping the world's poor. One such priority involves campaigning for the cancellation of foreign debt in compensation for past injustices due to colonization.

As these examples illustrate, personal problems are connected to social structures at the micro-level, meso-level, macro-level, and global level. Whether the personal problem involves finding a job, gaining influence in a political party, keeping a marriage intact, or figuring out a way to end world poverty, social-structural considerations broaden our understanding of the problem and suggest appropriate courses of action.

THE SOCIOLOGICAL IMAGINATION

In the 1950s, the great American sociologist C. Wright Mills (1959) called the ability to see the connection between personal troubles and social structures the **sociological imagination**. He emphasized the difficulty of developing this quality of mind. His language is sexist by today's standards, but his argument is as true and inspiring today as it was in the 1950s:

> When a society becomes industrialized, a peasant becomes a worker; a feudal lord is liquidated or becomes a businessman. When classes rise or fall, a man is employed or unemployed; when the rate of investment goes up or down, a man takes new heart or goes broke. When war happens, an insurance salesman becomes a rocket launcher; a store clerk, a radar man; a wife lives alone; a child grows up without a father. Neither the life of an individual nor the history of a society can be understood without understanding both.
>
> Yet men do not usually define the troubles they endure in terms of historical change. . . . The well-being they enjoy, they do not usually impute to the big ups and downs of the society in which they live. Seldom aware of the intricate connection between the patterns of their own lives and the course of world history, ordinary men do not usually know what this connection means for the kind of men they are becoming and for the kind of history-making in which they might take part. They do not possess the quality of mind essential to grasp the interplay of men and society, of biography and history, of self and world. They cannot cope with their personal troubles in such a way as to control the structural transformations that usually lie behind them.
>
> What they need . . . is a quality of mind that will help them to [see] . . . what is going on in the world and . . . what may be happening within themselves. It is this quality . . . that . . . may be called the sociological imagination. (C. Wright Mills, 1959: 3–4)

To gain a better sense of what Mills meant by the sociological imagination, consider a story that has been repeated, with variations, many times. A 50-year-old woman loses a good job on the assembly line of a southern Ontario car plant when production moves to Mexico. After half a year of collecting employment insurance, she manages to land a job at the checkout counter of a local Walmart. She earns less than half her previous salary. She had hoped to help her son pay tuition when he started college but can no longer afford that because her income is now barely enough to pay for food, rent, and utilities. Her son is a good student but he now has to delay his plan to go to college for at least a couple years while he earns tuition money. The woman blames herself for not being able to land a better job. She becomes depressed. To cope, she starts smoking and drinking more—and taking high-interest payday loans to feed her habits. The son's resentment and anger toward his mother grow, so they argue a lot. Family life, once happy, becomes miserable.

Will the woman develop a chronic illness because of the stress, the smoking, and the drinking? Will the son get caught stealing clothes he can't afford? Will he ever make it to college? Or will they apply the sociological imagination to their situation and come to realize that their personal troubles are the result of powerful social forces that they can help to control?

Here is what the sociological imagination could teach them: Since the 1970s, many large North American corporations have been moving manufacturing industries to low-wage countries like Mexico and China so they can pay workers less and earn bigger profits. Millions of North Americans have seen their steady, relatively high-paying jobs vanish. Their quality of life has gone downhill. Yet some countries have been able to withstand the challenge of deindustrialization, which is taking place in many rich countries. For instance, in Denmark, the government gives people who lose jobs relatively generous unemployment benefits for a couple of years, organizes programs that retrain them for skilled jobs that are in high demand, and requires that they complete such a program. Denmark therefore knows nothing like the growing unemployment and poverty that grips parts of southern Ontario, let alone the United States, where government programs are even less generous and economic inequality is higher (Andersen, 2016). Hope exists, but it requires political action.

THREE REVOLUTIONS AND THE ORIGINS OF THE SOCIOLOGICAL IMAGINATION

The sociological imagination is a recent addition to the human repertoire. It is only about two centuries old. True, in ancient and medieval times, some philosophers wrote about society. However, their thinking was not sociological. They believed God and Nature controlled society. They spent much of their time sketching blueprints for the ideal society and urging people to follow those blueprints. They relied on speculation rather than evidence to reach conclusions about how society works.

The sociological imagination was born when three modern revolutions pushed people to think about society in an entirely new way. First, the **Scientific Revolution** began about 1550. It encouraged the view that sound conclusions about the workings of society must be based on solid evidence, not just on speculation. Second, the **Democratic Revolution** began about 1750. It suggested that people are responsible for organizing society and that human intervention can therefore solve social problems. Third, the **Industrial Revolution** began about 1780. It created a host of new and serious social problems that attracted the attention of many social thinkers. Let us briefly consider these three sources of the sociological imagination.

The Scientific Revolution

It is said that a group of medieval monks once wanted to know how many angels could dance on the head of a pin. They consulted the Bible and other ancient, authoritative books in Hebrew, Greek, and Latin. They thought long and hard. They employed all of their intellectual skills to debate the issue. They did not, however, resolve the dispute because they never considered inspecting the head of a pin and counting. Any such suggestion would have been considered heresy. We, in contrast, would call it the beginning of a scientific approach to the subject. Scientific knowledge is based on systematic observation and the public scrutiny of evidence; the enemies of scientific knowledge are tradition, authority, and secrecy.

People often link the Scientific Revolution to specific ideas, such as Copernicus's theory that Earth revolves around the Sun and Newton's laws of motion. However, science is less a collection of ideas than a method of inquiry. For instance, in 1609, Galileo pointed his newly invented telescope at the heavens, made some careful observations, and showed that his observations fit Copernicus's theory. This is the core of the scientific method: using evidence to make a case for a particular point of view. By the mid-seventeenth century, some philosophers, such as Descartes in France and Hobbes in England, were calling for a science of society. When sociology emerged as a distinct discipline in the nineteenth century, commitment to the scientific method was one firm pillar of the sociological imagination.

The Democratic Revolution

The second pillar of the sociological imagination is the realization that people control society and can change it. Four hundred years ago, most Europeans thought otherwise. For them, God ordained the social order.

Consider the English engraving reproduced in Figure 1.4. It shows how most educated Europeans pictured the universe in Shakespeare's time. Note the cloud at the top of the circle. The Hebrew name of God is inscribed on it. God's hand extends from the cloud. It holds a chain, which is attached to a woman representing Nature. Nature also holds a chain in her hand. It is connected to "the ape of Nature," repre-

FIGURE 1.4 The Elizabethan Worldview

SOURCE: From Robert Fludd's *Utriusque Cosmi Historia* (1617–19). Photograph courtesy of Houghton Library, Harvard College Library.

senting humankind. The symbolism is clear: God and his intermediary, Nature, control human action.

Note also that the engraving arranges everything in a linked hierarchy. The hierarchy includes the mineral, vegetable, and animal kingdoms; the elements; heavenly objects; angels; and so on. Each level of the hierarchy corresponds to and controls some aspect of the level below it. For example, people believed Archangels regulated the movements of the planet Mercury, and the movements of Mercury affected human commerce. Similarly, in the medieval view, God ordained a hierarchy of people. The richest people were seen as the closest to God and therefore deserving of great privilege. Supposedly, kings and queens ruled because God wanted them to (Tillyard, 1943).

The American Revolution (1775–83) and the French Revolution (1789–99) helped to undermine these ideas. Those democratic political upheavals showed that society could experience massive change in a short period. They proved that people could replace unsatisfactory rulers. And they suggested that *people* control society. The implications for social thought were profound, for if it was possible to change society by human intervention, then a science of society could play a big role. The new science could help people figure out ways of overcoming various social problems, improving the welfare of all citizens, and finding the most effective way to reach given goals. Much of the justification for sociology as a science arose out of the democratic revolutions that shook Europe and North America.

The Industrial Revolution

The third pillar of the sociological imagination was the Industrial Revolution, which began in England about 1780. Because of the growth of industry, masses of people moved from countryside to city, worked agonizingly long hours in crowded and dangerous mines and factories, lost faith in their religions,

confronted faceless bureaucracies, and reacted to the filth and poverty of their existence by means of strikes, crime, revolution, and war. Scholars had never seen a sociological laboratory like this. The Scientific Revolution suggested that a science of society is possible. The Democratic Revolution suggested that people can intervene to improve society. The Industrial Revolution now presented social thinkers with a host of pressing social problems crying out for solution. They responded by giving birth to the sociological imagination.

TIME FOR REVIEW

1. How does the sociological study of suicide show that a distinctively *social* realm influences all human behaviour, even if the behaviour seems nonsocial or antisocial?
2. What are microstructures, mesostructures, macrostructures, and global structures?
3. How did the Scientific Revolution, the Industrial Revolution, and the Democratic Revolution influence the emergence of sociology?

SOCIOLOGICAL THEORIES

THE ORIGINS OF SOCIOLOGY

French social thinker Auguste Comte (1798–1857) coined the term *sociology* in 1838 (Thompson, 1975). Comte tried to place the study of society on scientific foundations. He wanted to understand the social world as it is, not as he or anyone else imagined it should be. This was a highly original approach to the study of society. In ancient and medieval times, philosophers from diverse civilizations had sketched blueprints for the ideal society. We see evidence of this approach in the work of Confucius in China, Ibn Khaldun in Tunisia, and Plato and Aristotle in Greece. But Comte was swept up in the scientific revolution of his time. He was inspired by the astronomers and physicists of the modern era—Copernicus in Poland, Galileo in Italy, Newton in England. He wanted to test the validity of his ideas through careful observation of the real world rather than assuming that "God" or "human nature" determined the shape of society.

Despite Comte's breakthrough, there was tension in his work, for although he was eager to adopt the scientific method in his study of society, he was a conservative thinker, motivated by strong opposition to rapid change in French society. His was a time not only of scientific but also of political and social revolution. Comte witnessed the democratic forces unleashed by the French Revolution, the early industrialization of society, and the rapid growth of cities. What he saw shocked and angered him because rapid social change was destroying many of the things he valued, especially respect for authority. He therefore urged slow change and the preservation of much that was traditional in social life. Thus, at its very origin, sociological research was motivated by adherence to scientific methods of research *and* a vision of the ideal society.

The same sort of tension is evident in the work of the most important early figures in the history of sociology: Karl Marx (1818–83), Émile Durkheim (1858–1917), and Max Weber (pronounced VAY-ber; 1864–1920). These three men lived in the period from 1818 to 1920. They witnessed various phases of Europe's wrenching transition to industrial capitalism, and they wanted to understand and explain it. Like Comte, they were all committed to the scientific method of research. However, they also wanted to chart a better course for their societies. The ideas they developed are therefore not just diagnostic tools from which we can still learn much, but also, like many sociological ideas, prescriptions for combating social ills.

THEORY, RESEARCH, AND VALUES

To clarify the tension in sociology between analysis and ideal, diagnosis and prescription, we can usefully distinguish three terms: theory, research, and values.

Sociological ideas are generally stated in the form of theories. A **theory** is a tentative explanation of some aspect of social life. It states how and why certain facts are related. For example, in his theory of suicide, Durkheim showed how facts about suicide rates are related to facts about social solidarity. This enabled him to explain suicide as a function of social solidarity. In this broad definition, even a hunch qualifies as a theory if it suggests how and why certain facts are related.

After theories are formulated, the sociologist can conduct research. **Research** is the process of systematically observing social reality to assess the validity of a theory. It is because research can call the validity of a theory into question that theories are said to be only "tentative" explanations. The research process is discussed in detail in Chapter 2, Research Methods.

Before sociologists can formulate a theory, however, they must decide which problems are important enough to study and how the parts of society

fit together. If they are going to recommend ways of improving the operation of some aspect of society, they must even have an opinion about what the ideal society ought to look like. As we will soon see, these issues are shaped in large measure by sociologists' values. **Values** are ideas about what is right and wrong, good and bad. Inevitably, values help sociologists formulate and favour certain theories over others (Edel, 1965; Kuhn, 1970). So sociological theories may be modified and even rejected because of research, but they are often motivated by sociologists' values.

Durkheim, Marx, and Weber initiated three of the major theoretical traditions in sociology: functionalism, conflict theory, and symbolic interactionism. A fourth approach, feminism, has arisen in recent decades to correct some of the deficiencies of the three long-established traditions. It will become clear as you read this book that there are many more sociological theories than just these four. However, because these four traditions have been especially influential in the development of sociology, you will find it useful to read a thumbnail sketch of each one here at the beginning.[1]

FUNCTIONALISM

Durkheim's theory of suicide is an early example of what sociologists now call **functionalist theory**. Functionalist theories incorporate four features:

1. Functionalist theories stress that human behaviour is governed by relatively stable patterns of social relations, or social structures. For example, Durkheim emphasized how suicide rates are influenced by patterns of social solidarity. Usually the social structures analyzed by functionalists are macrostructures.
2. Functionalism underlines how social structures maintain or undermine social stability. Typically, Durkheim analyzed how the growth of industries and cities in nineteenth-century Europe lowered the level of social solidarity and contributed to social instability. One aspect of instability, said Durkheim, is a higher suicide rate. Another is frequent strikes by workers.
3. Functionalist theories emphasize that social structures are based mainly on shared values or preferences. So when Durkheim wrote about

Before delving into social research, a sociologist must first develop hypotheses—testable claims about the social world. Testing hypotheses by means of research helps determine the validity of theories.

SOURCE: © Davidian/iStockphoto.com.

social solidarity, he sometimes meant the frequency and intensity of social interaction, but more often he thought of social solidarity as a sort of moral cement that binds people together.

4. Functionalism suggests that reestablishing equilibrium can best solve most social problems. Durkheim said that social stability could be restored in late-nineteenth-century Europe by creating new associations of employers and workers that would lower workers' expectations about what they could expect out of life. If, said Durkheim, more people could agree on wanting less, social solidarity would rise and there would be fewer strikes, fewer suicides, and so on. Functionalism, then, was a conservative response to widespread social unrest in nineteenth-century France. (A more radical response would have been to argue that if people are expressing discontent because they are getting less out of life than they expect, discontent can be lowered by figuring out ways for them to get more out of life.)

S. D. Clark (1910–2003) received his PhD from the University of Toronto. He became the first chair of the Department of Sociology at that institution. Born in Lloydminster, Alberta, he is especially well known for his studies of Canadian social development as a process of disorganization and reorganization on a series of economic frontiers (Clark, 1968). The influence of functionalism on his work is apparent in his emphasis on the way society reestablishes equilibrium after experiencing disruptions caused by economic change.
SOURCE: Photo courtesy of Ed Clark.

Although functionalist thinking influenced North American sociology at the end of the nineteenth century, it was only during the continent's greatest economic crisis ever, the Great Depression of 1929–39, that functionalism took deep root here (Russett, 1966). With 30 percent of the paid labour force unemployed and labour unrest reaching unprecedented levels, it is not surprising that sociologists with a conservative frame of mind were attracted to a theory that focused on how social equilibrium could be restored. Functionalist theory remained popular in North America for 30 years. It experienced a minor revival in the early 1990s but never regained the dominance it enjoyed from the 1930s to the early 1960s.

Sociologist Talcott Parsons was the foremost proponent of functionalism. He is best known for identifying how various institutions must work to ensure the smooth operation of society as a whole. For instance, when the family successfully raises new generations, the military successfully defends society against external threats, schools teach students the skills and values they need to function as productive adults, and religion creates a shared moral code among people, then, said Parsons, society is well integrated and in equilibrium (Parsons, 1951).

Parsons was criticized for exaggerating the degree to which members of society share common values and social institutions contribute to social harmony. This led North America's other leading functionalist, Robert Merton, to propose that social structures may have different consequences for different categories of people. Merton noted that some of these might be disruptive or **dysfunctional** consequences (Merton, 1968 [1949]; see the feature Critical Sociology: Dysfunctional Religion). Moreover, said Merton, although some functions are manifest (visible and intended), others are latent (invisible and unintended). For instance, a **manifest function** of schools is to transmit skills from one generation to the next. A **latent function** of schools is to encourage the development of a separate youth culture that often conflicts with parents' values (Coleman, 1961; Hersch, 1998).

CONFLICT THEORY

The second major theoretical tradition in sociology emphasizes the centrality of conflict in social life. **Conflict theory**

1. generally focuses on large, macro-level structures, such as the relations between or among classes;
2. shows how major patterns of inequality in society produce social stability in some circumstances and social change in others;
3. stresses how members of privileged groups try to maintain their advantages while subordinate groups struggle to increase theirs. From this point of view, social conditions at a given

Critical Sociology DYSFUNCTIONAL RELIGION

Durkheim and Parsons emphasized how religion makes society more cohesive. They ignored how, throughout history, major world religions have incited violence and even war. However, there is a less obvious way in which major world religions, especially the Abrahamic religions (Judaism, Christianity, and Islam) have been dysfunctional: They proclaim that people have the right to rule Nature. It says so right in Exodus (1: 26), where God proclaims: "They shall rule over the fish of the sea, the birds of the sky, and over the animals, the whole earth, and every creeping thing that crawls upon the earth."

We have taken these words to heart. In the process of achieving dominion over Nature, we drove to extinction other human species (*Homo Neanderthalensis* was the last to go) and half of all large land mammals once in existence. Today, more than 16 000 species of mammals, birds, reptiles, amphibians, fish, and insects—not to mention large swaths of humanity—are endangered by human actions that are responsible for climate change (International Union for Conservation of Nature, 2016). We domesticated some animals and modelled our industrialized system of animal food production on the concentration camp—separating the young from their parents, tightly confining them for most of their lives, and then killing them (Harari, 2017).

Monotheistic religions like Judaism, Christianity, and Islam legitimize our domination of Nature by teaching that only humans have souls. If pigs, cows, chickens, forests, fields, and bodies of water lack souls, it follows that humans can do whatever they want with them.

In contrast, most traditional Indigenous religions are animistic. **Animism** also teaches that humans have souls. However, in the animistic worldview, so do animals, plants, and natural phenomena such as rain. As such, animism accords the beings and things that populate Nature a level of respect that monotheistic religions lack. Traditional Indigenous religions implore people to live in harmony with Nature, not to dominate it.

Critical Thinking Question

1. What would humanity gain and lose if proponents of the major world religions allowed themselves to be influenced by Indigenous animism?

time are the expression of an ongoing power struggle between privileged and subordinate groups;

4. typically leads to the suggestion that decreasing privilege will lower the level of conflict and increase the sum total of human welfare.

The conflict paradigm originated in the work of Karl Marx. A generation before Durkheim, Marx observed the destitution and discontent produced by the Industrial Revolution and proposed a sweeping argument about the way societies develop (Marx, 1904 [1859]; Marx and Engels, 1972 [1848]). Marx's theory was radically different from Durkheim's. Class conflict lies at the centre of his ideas.

Marx argued that owners of industry are eager to improve the way work is organized and to adopt new tools, machines, and production methods. These innovations allow them to produce more efficiently, earn higher profits, and drive inefficient competitors out of business. However, according to Marx, the drive for profits causes capitalists to concentrate workers in larger and larger establishments, keep wages as low as possible, and invest as little as possible in improving working conditions. Thus, in factories and in mines, a large and growing class of poor workers begins to oppose a small and shrinking class of wealthy owners.

Marx believed that workers would ultimately become aware of belonging to the same exploited class. Their sense of "class consciousness," he wrote, would encourage the growth of trade unions and labour parties. These organizations would eventually seek to put an end to private ownership of property, replacing it with a system in which everyone shared property and wealth. This was the "communist" society envisaged by Marx—a society in which there is no private property and everyone shares wealth in proportion to their need.

Weber

Although some of Marx's ideas have been usefully adapted to the study of contemporary society, his predictions about the inevitable collapse of capitalism have been questioned. Max Weber, a German sociologist who wrote his major works a generation after Marx, was among the first to find flaws in Marx's argument (Weber, 1946). Weber noted the rapid growth

Max Weber wrote that the modern era is a bureaucratically organized "iron cage." Sociology promises to teach us both the dimensions of that cage and the possibilities for release.

SOURCE: Carol Wainio, *Study for a Portrait of Nietzsche*, 1985, acrylic on paper, 24" × 38". Courtesy Carol Wainio.

of the "service" sector of the economy with its many nonmanual workers and professionals. He argued that many members of these occupational groups stabilize society because they enjoy higher status and income than do manual workers employed in the manufacturing sector. In addition, Weber showed that class conflict is not the only driving force of history. In his view, politics and religion are also important sources of historical change (see the next section).

Other writers pointed out that Marx did not understand how investing in technology would make it possible for workers to toil fewer hours under less oppressive conditions. Nor did he foresee that higher wages, better working conditions, and government benefits, such as employment insurance and medicare, would pacify manual workers. As a result, many of the particulars of Marx's theory were called into question by Weber and other sociologists. Nonetheless, Marx's insights about the fundamental importance of conflict in social life were influential then—and still are today.

Conflict Theory in North America

Conflict theory had some advocates in North America before the 1960s. Most noteworthy is C. Wright Mills, who laid the foundations for modern conflict theory in the 1950s. Mills conducted pioneering research on American politics and class structure. One of his most important books is *The Power Elite*, a study of the several hundred men who occupied the "command posts" of the American economy, military, and government. He argued that power is highly concentrated in American society, which is therefore less of a democracy than we are often led to believe (Mills, 1956).

Exceptions like Mills notwithstanding, conflict theory did not really take hold in North America until the 1960s, a decade rocked by growing labour unrest, Quebec separatism, anti-Vietnam War protests, the rise of the black power movement, and the revival of feminism, which had fallen dormant after its first stirrings in the late nineteenth and early twentieth centuries. Strikes, demonstrations, and riots were almost daily occurrences in the 1960s and early 1970s, and therefore many sociologists of that era considered conflict among classes, nations, races, and generations to be the very essence of society.

THE CULTURAL TURN AND POSTSTRUCTURALISM: GRAMSCI AND FOUCAULT

In the 1960s and 1970s, conflict theory took what has been called a "cultural turn." Increasingly, conflict theorists directed their attention to the ways in which language, music, literature, fashion, movies, advertising, and other elements of culture express domination by the powerful and resistance by others.

The origins of a cultural approach to the study of social conflict are found in essays written in the early twentieth century by an Italian Marxist, Antonio Gramsci (pronounced GRAM-shee). In Gramsci's view, ruling classes establish their dominance partly by controlling jobs, using force, and the like. However, they also exercise power in softer ways. In particular,

John Porter (1921–79) was Canada's premier sociologist in the 1960s and 1970s. Born in Vancouver, he received his PhD from the London School of Economics. He spent his academic career at Carleton University in Ottawa. There he served as Chair of the Department of Sociology and Anthropology, Dean of Arts and Science, and Vice-President. His major work, *The Vertical Mosaic* (1965), is a study of class and power in Canada. Firmly rooted in the conflict paradigm, it influenced a generation of Canadian sociologists in their studies on social inequality, elite groups, French–English relations, and Canadian–American relations.

SOURCE: Reprinted with permission from Carleton University Archives.

they fund the development, transmission, and learning of ideas that seem to embody the values of everyone but are actually biased in favour of class dominance. Gramsci wrote that **cultural hegemony** exists when these values become so deeply entrenched that the great majority of people accept them as common sense (Gramsci, 1957, 1971). Subordinate classes can resist cultural hegemony, Gramsci wrote, but only if they develop ideas and institutions that express and support their own cultural preferences. Later writers extended Gramsci's argument to include dominant, taken-for-granted ideas about race, ethnicity, sexuality, and so on.

In France from the 1950s to the 1980s, Michel Foucault (pronounced Foo-CŌ) further developed the notion that culture is the site of ongoing conflict between dominant and subordinate classes and other groups. Foucault made his case by studying new forms of regulation that accompany capitalist industrialization. He showed that, as the goal of maximizing economic productivity grows in importance, criminals, people with physical infirmities, people with mental illness, and ordinary students and workers are subjected to new structures of control in prisons, hospitals, institutions for the mentally ill, workplaces, schools, and universities.

According to Foucault (1973, 1977, 1988), modern institutions sometimes use violence to regulate behaviour but they more often rely on new technologies and the *internalization* of control mechanisms. For example, modern institutions are physically, technologically, and socially designed so that authorities can easily observe the behaviour of inmates, patients, workers, and students. Authorities may not always watch their "clientele," but when inmates and others know that they *may* be under the watchful eye of authorities, they usually act as if they *are* being observed. Before capitalist industrialization, control took place almost exclusively through force, but now more subtle and effective mechanisms of regulation are employed.

According to Foucault, power is exercised in every social interaction, but every social interaction is also subject to resistance by subordinates—the exercise of power is unstable. Dominant groups and individuals must continuously renew their power relations to maintain control but sometimes they fail, providing subordinates with the opportunity to assert their interests.

Foucault was part of a movement in French social thought known as **poststructuralism**. Earlier social thinkers had argued that social relations and cultures form structures, or stable determinants of the way people think and act. These "structuralists" typically categorized elements of social relations and of culture as binary opposites: male versus female, civilized versus uncivilized people, black versus white races, and so on (Derrida, 2004: 41). In contrast, poststructuralists, Foucault among them, denied the stability of social relations and of cultures, their capacity always to shape how people think and act, and their neat categorization of social and cultural elements as binary opposites. According to the poststructuralists, the social world is a more fluid and complex place, and people are more often the agents of their own destiny than structuralists ever imagined.

To better understand these ideas, consider that many of us casually use the term "the opposite sex" in everyday speech without giving it much thought. Yet embedded in this term is a faulty set of assumptions based on a distribution of power that favours some categories of people at the expense of others. As you will learn in Chapter 5, Genders and Sexualities, it is factually incorrect to assume that men and women are opposites in their sexual identities, preferences, and behaviours. It is more accurate to say that men and women are arrayed along one scale with respect to their sexual identities, a second scale with respect to their sexual preferences, and a third scale with respect to their sexual behaviours, and their positions on these scales can change in different circumstances.

When we perceive men as remaining clustered on one extreme of a single scale and women on the other extreme—when we view women and men as fixed "opposites"—we oversimplify the complexity of real flesh-and-blood people. We also ignore that many women and men are not so neatly pigeonholed. People who are not included in the conventional categorization are simply defined out of existence by our casual use of language and the underlying fact that some people have more power than others to name things.

As you will see in later chapters, Foucault's influence and that of other poststructuralists span many areas of contemporary sociology, including the study of deviance and crime, sexualities and genders, education, and social stratification.

SYMBOLIC INTERACTIONISM

Earlier it was noted that Weber criticized Marx's interpretation of the development of capitalism. Among other things, Weber argued that early

capitalist development was caused not just by favourable *economic* circumstances. In addition, he wrote, certain *religious* beliefs facilitated robust capitalist growth. In particular, sixteenth- and seventeenth-century Protestants believed their religious doubts could be reduced, and a state of grace ensured, if they worked diligently and lived modestly. Weber called this belief the **Protestant ethic**. He believed it had an unintended effect: People who adhered to the Protestant ethic saved and invested more than others did. So, according to Weber, capitalism developed most robustly where the Protestant ethic took hold. He concluded that capitalism did not develop because of the operation of economic forces alone, as Marx argued. Instead, it depended partly on the religious meaning individuals attached to their work (Weber, 1958 [1904–05]).

In much of his research, Weber emphasized the importance of empathetically understanding people's motives and the meanings they attach to things to gain a clear sense of the significance of their actions. He called this aspect of his approach to sociological research the method of *Verstehen* (pronounced Fer-SHTAY-en, meaning "understanding" in German).

The idea that subjective meanings must be analyzed in any complete sociological analysis was only one of Weber's contributions to early sociological theory. Weber was also an important conflict theorist, as you will learn in later chapters. At present, however, it is enough to note that his emphasis on subjective meanings found rich soil in North America, for this was an idea that resonated deeply with the individualism of North American culture.

A century ago, it was widely believed that individual talent and initiative could achieve just about anything on this continent of opportunity. Small wonder, then, that much of early North American sociology focused on the individual or, more precisely, on the connection between the individual and the larger society. For example, George Herbert Mead at the University of Chicago was the driving force behind the study of how individual identity is formed in the course of interaction with other people. We discuss his contribution in Chapter 4, Socialization. Here we note only that the work of Mead and his colleagues gave birth to symbolic interactionism, a distinctively North American theoretical tradition that continues to be a major force in sociology today.

Functionalists and conflict theorists assume that people's group memberships—whether they are young or old, male or female, rich or poor—influence their behaviour. This can sometimes make people seem like balls on a pool table: They get knocked around and cannot determine their destinations. We know from our everyday experience, however, that people are not like that. You often make choices, sometimes difficult ones. You sometimes change your mind. Moreover, two people with similar social characteristics may react differently to similar social circumstances because they may interpret those circumstances differently.

Recognizing these issues, some sociologists focus on the subjective side of social life. They work in the symbolic interactionist tradition. **Symbolic interactionism**

1. focuses on face-to-face communication or interaction in micro-level social settings. This feature distinguishes it from both the functionalist and the conflict paradigms;
2. emphasizes that an adequate explanation of social behaviour requires understanding the subjective meanings people attach to their social circumstances;
3. stresses that people help to create their social circumstances and do not merely react to them;[2]
4. validates unpopular and nonofficial viewpoints by underscoring the subjective meanings that people create in small social settings, increasing our understanding and tolerance of people who may be different than us.

To understand symbolic interactionism better, let us return briefly to the problem of suicide. If a police officer discovers a dead person at the wheel of a car that has run into a tree, it may be difficult to establish with certainty whether the death was an accident or a suicide. Interviewing friends and relatives to discover the driver's state of mind just before the crash may help to rule out the possibility of suicide. But, as this example illustrates, understanding the intention or motive of the actor is critical to understanding the meaning of a social action and explaining it. Suicide, then, is not just an objective social fact but also an inferred, and therefore subjective, social fact. A state of mind must be interpreted, usually by a coroner, before the dead body becomes a suicide statistic (Douglas, 1967).

For surviving family and friends, suicide is always painful and sometimes embarrassing. Insurance companies often deny payments to beneficiaries in the case of suicide. As a result, coroners are inclined to classify deaths as accidental whenever such an interpretation

Erving Goffman (1922–82) was born in Mannville, Alberta. He studied sociology and anthropology as an undergraduate at the University of Toronto and completed his PhD at the University of Chicago. He pursued his academic career at the University of California, Berkeley, and the University of Pennsylvania. Goffman developed an international reputation for his "dramaturgical" approach to symbolic interactionism. This approach highlights the way people present themselves to others, managing their identities to create desired impressions on their "audience," in much the same way as actors do on stage (Goffman, 1959).
SOURCE: Courtesy of the American Sociological Association.

is plausible. Being human, they want to minimize the family's pain after such a horrible event. Sociologists believe that, for this reason, official suicide rates are about one-third lower than actual suicide rates.

Social Constructionism and Queer Theory

Social constructionism is a variant of symbolic interactionism that has become popular in recent years. Social constructionists argue that when people interact, they typically assume things are naturally or innately what they seem to be, but in reality, apparently natural or innate features of life are sustained by *social* processes that vary historically and culturally.

For example, many people assume that differences in the way women and men behave are the result of their different biological makeup. In contrast, social constructionists show that many of the presumably natural differences between women and men depend on the way power is distributed between them and the degree to which certain ideas about women and men are shared (see Chapter 5, Genders and Sexualities; Berger and Luckmann, 1966; West and Zimmerman, 1987). Since power distributions and ideas about gender vary over time and place, social constructionists are able to show how changing social conditions produce changes in the way people act out their gender identity. They conclude that gender is more a performance shaped by social conditions than part of a person's essence. People usually do such a good job of building natural-seeming identities in their everyday interactions—not just gender but also ethnicity, race, nationality, religion, and so on—that they do not notice the materials used in the construction process. Social constructionists identify those materials and analyze how people piece them together.

Queer theory takes the social constructionist argument a step farther by denying the very existence of stable identities (Green, 2007). From the queer theorist's point of view, when we apply such labels as "male," "female," "gay," and "lesbian" to ourselves or others, we are adopting conventional labels that fail to capture the instability of sexual identities and performances that characterizes the lives of many people. Such labels impose social conventions on people, thus acting as forms of control and domination and drawing attention away from the uniqueness of each individual (for more on queer theory, see Chapter 5, Genders and Sexualities).

In sum, the study of the subjective side of social life helps to take us beyond the official picture by deepening our understanding of how society works and supplementing the insights gained from macro-level analysis. By stressing the importance and validity of subjective meanings, symbolic interactionists increase tolerance for minority and deviant viewpoints. By stressing how subjective meanings vary historically and culturally, social constructionists and queer theorists show that many seemingly natural features of social life actually require painstaking acts of social creation.

FEMINIST THEORY

Few women figured prominently in the early history of sociology, largely because the strict demands placed on women by the nineteenth-century household and the lack of opportunity outside the household prevented most of them from obtaining a higher education and finding work that could support sociological research. Not surprisingly, therefore, the women who did make their mark on the discipline in its early years had unusual social backgrounds. These exceptional people introduced into the discipline gender issues that were largely ignored by Marx, Durkheim, Weber, and Mead. Appreciation for the sociological contribution of these pioneer women has grown in recent years as concern with gender issues has come to form a substantial part of the modern sociological enterprise.

Harriet Martineau is often called the first woman sociologist. Born in England at the beginning of the nineteenth century to a prosperous family, she never married and was able to support herself comfortably from her journalistic writings. Martineau translated Comte into English. She undertook critical studies of slavery and factory laws. She also wrote about gender inequality and was a leading advocate of voting rights and higher education for women, as well as gender equality in the family. Martineau was one of the first feminists (Yates, 1985).

Despite its early stirrings, feminist thinking had little impact on sociology until the mid-1960s, when the rise of the modern women's movement drew attention to the many remaining inequalities between women and men. Since then, feminist theory has had such a big influence on sociology that it may now fairly be regarded as sociology's fourth major tradition. There are several variants of modern feminism (see Chapter 5, Genders and Sexualities). However, the various strands of **feminist theory** share the following four features. Feminist theory

1. focuses on various aspects of patriarchy, the system of male domination in society. Patriarchy, feminists contend, is at least as important as class inequality in determining a person's opportunities in life, and perhaps more so;
2. holds that male domination and female subordination are determined not by biological necessity but by structures of power and social convention. From this point of view, women are subordinate to men only because men enjoy more legal, economic, political, and cultural rights;
3. examines the operation of patriarchy in both micro and macro settings;
4. contends that existing patterns of gender inequality can and should be changed for the benefit of all members of society. The main sources of gender inequality include differences in the way boys and girls are brought up; barriers to equal opportunity in education, paid work, and politics; and the unequal division of domestic responsibilities between women and men.

The theoretical traditions outlined above are summarized in Table 1.1. As you will see in the following pages, sociologists in Canada and elsewhere have applied them to all branches of the discipline. They have elaborated and refined each of them. Some sociologists work exclusively in one tradition. Others conduct research that borrows from more than one tradition. However, all sociologists are deeply indebted to the founders of the discipline.

Margrit Eichler (1942–) was born in Berlin, Germany. She obtained her PhD at Duke University in the United States before beginning her academic career in Canada. She served as Chair of the Department of Sociology at the Ontario Institute for Studies in Education and as Head of the Women's Studies Program at the University of Toronto. She is internationally known for her work on feminist methodology (Eichler, 1987). Her work on family policy in Canada has influenced students, professional sociologists, and policymakers for decades (Eichler, 1988).

SOURCE: Photo © Karyn Gorra. Courtesy Margrit Eichler.

TIME FOR REVIEW

1. What is the relationship among values, theories, and research?
2. What are the key features of the four main theoretical traditions?
3. What is the "cultural turn" in the conflict tradition?
4. What does queer theory contribute to symbolic interactionism?

THEIR REVOLUTION AND OURS

In the nineteenth century, the founders of the discipline devoted their lives to solving the great sociological puzzle of their time: the causes and consequences of the Industrial Revolution. However, the ideas that stirred them did not spring fully grown from their minds. Rather, their social experiences helped to shape their ideas. There is an important lesson to be learned here. In general, sociological ideas are influenced by the social settings in which they emerge.

This lesson suggests two important questions. First, what are the great sociological puzzles of *our* time? Second, how are today's sociologists responding

TABLE 1.1 The Main Theoretical Traditions in Sociology

PARADIGM	MAIN LEVEL OF ANALYSIS	MAIN FOCUS	MAIN QUESTION	IMAGE OF IDEAL SOCIETY
Functionalism	Macro	Values	How do the institutions of society contribute to value consensus and, thus, to social stability?	A state of equilibrium
Conflict theory	Macro	Class inequality	How do privileged groups seek to maintain their advantages and subordinate groups seek to increase theirs, often causing social change in the process?	The reduction of privilege, especially class privilege
Symbolic interactionism	Micro	Meaning	How do individuals communicate so as to make their social settings meaningful?	Respect for the validity of minority views
Feminism	Micro and macro	Patriarchy	Which social structures and interaction processes maintain male dominance and female subordination?	The reduction of gender inequality

to the challenges presented by the social settings in which *they* live? The rest of the book is devoted to answering these questions in depth. The remainder of this chapter offers an outline of what you can expect to learn. To provide a context for this outline, let us now consider how the Industrial Revolution of the nineteenth century was transformed into the Postindustrial Revolution of our day.

THE POSTINDUSTRIAL REVOLUTION

The Industrial Revolution involved the application of science and technology to industrial processes, the construction of factories, and the formation of a large class of blue-collar workers. Within about a century, it took root throughout Western Europe, North America, and Japan. A century after that, industry had begun implanting itself in most of the rest of the world.

As noted in our discussion of Marx, the industrial working class protested long workdays, low pay, and dangerous working conditions. Workers went on strike, formed unions, and joined political parties. Their protests forced governments to tax citizens to provide at least minimal protection against ill health, unemployment, and poverty. Working-class protests also forced employers to limit the length of the workweek to 40 hours, improve working conditions, and raise wages. Employers were still able to increase their profits, however, by making the organization of work more efficient and introducing new technologies.

Collecting taxes, administering social services, providing healthcare, and investing heavily in technological innovation required the growth of government and business offices, hospitals, schools, universities, and research laboratories. Thus, alongside the old manufacturing sector of the economy, the new service sector was born. Its employees came to be known as *white-collar workers*. Highly trained professionals stood at the peak of the service sector. Secretaries and clerks were positioned near its base. By 1980, more than half of all people working in Canada's paid labour force were in nonmanual occupations (Ornstein, 1983: 252). Sociologists call this most recent transformation of human society the **Postindustrial Revolution**. Specifically, the Postindustrial Revolution refers to the technology-driven shift from manufacturing to service industries and the consequences of that shift for virtually all human activities (Bell, 1976; Toffler, 1990).

Especially since the early 1980s, the Postindustrial Revolution has been speeded up by **globalization**—the process by which formerly separate economies, states, and cultures become tied together and people become increasingly aware of their growing interdependence (Giddens, 1990: 64; Guillén, 2001). In recent decades, rapid increases in the volume of international trade, travel, and communication have

broken down the isolation and independence of most countries and people. Also contributing to globalization is the growth of many institutions that bind corporations, companies, and cultures together. These processes have caused people to depend more than ever on people in other countries for products, services, ideas, and even a sense of identity.

The causes and consequences of postindustrialism and globalization form the great sociological puzzles of our time. Much of this book is devoted to analyzing postindustrialism and globalization, and their effects. In concluding this chapter, a review of some of the sociological issues raised by the Postindustrial Revolution and globalization is therefore in order.

POSTINDUSTRIALISM AND GLOBALIZATION: OPPORTUNITIES AND PITFALLS

At the end of the twentieth century, many observers were wildly optimistic about the benefits that postindustrialism and globalization were supposedly going to bring to humanity. One commentator proclaimed "the end of history," by which he meant that liberal capitalism had become the unrivalled socioeconomic system in the world and its dominance was bound to usher in a long era of peace, freedom, and prosperity, leaving no corner of the world untouched (Fukuyama, 1992). Similarly, in a special issue of *The New York Times Magazine* devoted to technology, one staff writer gushed:

> Individuals are acquiring more control over their lives, their minds and their bodies, even their genes, thanks to the transformations in medicine, communications, transportation and industry. At the same time, these technologies are providing social benefits and undoing some of the damage of the past. Technology helps to conserve natural resources and diminish pollution. . . . The Information Revolution, besides enabling us to visit Mars at will, is fostering peaceful cooperation on Earth by decentralizing power. Political tyrants and demagogic warmongers are losing control now that their subjects have tools to communicate directly with one another. People are using the tools to do their jobs without leaving their families. They're forming new communities in cyberspace and forming new bonds with their neighbors in real space. Technology has the potential to increase individual freedom and strengthen community. (Tierney, 1997: 46–47)

This and similar outpourings of optimism were written before the stock market crash of 2000, the terrorist attacks on the United States on September 11, 2001, the second invasion of Iraq by the United States in 2003, the Great Recession of 2008-09, heightened fears about the consequences of climate change in the wake of increasingly severe weather events around the world, and the rise of white nationalism. However, even before these devastating shocks changed the minds of all but the most starry-eyed observers, sociologists were more realistic about the prospects for humanity. On the whole, they agreed that postindustrialism and globalization promise many exciting opportunities to enhance the quality of life and increase human freedom—but they also saw many social-structural barriers to the realization of that promise.

The unresolved social issues that confront us in the era of postindustrialism and globalization fall under three headings. Each issue is addressed in later chapters.

1. ***Autonomy vs. constraint.*** One of the major themes that emerge from this book is that many people are freer to construct their own identities than ever before. Almost everyone used to retain their religious, ethnic, racial, and sexual identities for a lifetime, even if they were not particularly comfortable with them. In the era of postindustrialism and globalization, however, various social developments and technological advances—ranging from international migration to the World Wide Web to greater acceptance of sexual diversity—free people from traditional constraints. The theme of increasing personal autonomy is taken up in Chapter 3, Culture; Chapter 4, Socialization; Chapter 5, Genders and Sexualities; Chapter 6, Communication and Mass Media; and Chapter 12, Religion.

   Some chapters, however, point out that we experience increased freedom only within certain limits. For example, we can choose a far wider variety of consumer products than ever before, but consumerism itself increasingly seems a compulsory way of life (Chapter 3, Culture). Moreover, it is a way of life that threatens the natural environment (Chapter 15, Politics and Social Movements). Meanwhile, new technologies, such as surveillance cameras, cause us to modify our behaviour and act in more conformist ways (Chapter 13, Deviance and

Crime). As these examples show, the autonomy promised by postindustrialism is only half of the story. The other half is that postindustrialism places new constraints on us.

2. ***Prosperity vs. inequality.*** The second major theme that emerges from this book is that postindustrialism opens up new economic, political, and educational opportunities. It makes work less onerous for many people. It raises the average standard of living. It enables women in particular to make rapid strides in all institutional spheres.

   Again, however, we must face the less rosy aspects of postindustrialism. Tremendous economic and political inequality between women and men persists (Chapter 5, Genders and Sexualities). So does inequality between Indigenous and other Canadians (Chapter 8, Race and Ethnic Relations; see also the Critical Sociology feature, Globalization and the Innu of Labrador). Inequality between rich and poor in Canada has increased in recent decades (Chapter 7, Social Stratification). It is reinforced partly by the educational system (Chapter 11, Education). By some measures, inequality between rich and poor nations has risen sharply (Chapter 9, Development, Underdevelopment, and Globalization). There are more good jobs at the top of the occupational structure, but many more bad jobs at the bottom (Chapter 7, Social Stratification). The quality of the Canadian healthcare system is threatened at precisely the moment when our population is rapidly aging and most in need of healthcare (Chapter 14, Health and Aging). Although elections are regularly held throughout much of the world, it is an illusion to think that democracy has conquered the planet (Chapter 15, Politics and Social Movements). Economic and political inequality persist despite growing prosperity and opportunity.

3. ***Diversity vs. uniformity.*** The third major theme that emerges from this book is that postindustrial society is more tolerant of diversity than any previous form of society was. Immigration policies no longer stipulate racial, ethnic, or religious criteria for entry into the country. As a result, our cities are more socially heterogeneous than ever before. The traditional nuclear family made up of mother, father, and children has given way to a wide variety of new family forms. Myriad radio stations, TV channels, newspapers, magazines, CD titles, books, and websites are now available to us.

   Yet despite growing social diversity, there is a strong push to conformity in many spheres of life. For example, most of our diverse cultural consumption is governed by the tastes and the profit motives of vast media conglomerates, most of them American-owned (Chapter 6, Communication and Mass Media). Powerful interests are trying to shore up the traditional nuclear family despite its inappropriateness for many people in postindustrial society (Chapter 10, Families). The globalization of economic, political, and cultural affairs may be threatening the survival of distinct national cultures (Chapter 3, Culture; see the feature Critical Sociology: Globalization and the Innu of Labrador). The push to uniformity thus counters the trend toward growing social diversity.

Critical Sociology — GLOBALIZATION AND THE INNU OF LABRADOR

Globalization began when international trade started in the Middle East thousands of years ago. It spread at a furious pace once millions of people started using the Internet in the 1980s. But the first burst of globalization to span the entire globe took place in the late fifteenth century, when explorers started sailing from Europe to Asia, Africa, and the Americas in search of wealth.

The effect of globalization in the age of exploration was devastating for non-Europeans, and especially for Indigenous peoples. Military conquest, forced migration, slavery, the spread of European diseases, and the theft of gold and other valuable resources was widespread. One indicator of the devastation that globalization wrought is that, in the territory that is now Canada, the size of the Indigenous population fell by three-quarters in the three centuries following 1600 (Brym, 2018 [2008]: 127).

In some cases, the full effect of globalization on Indigenous peoples was not felt until the middle of the twentieth century. The Innu of

(*continued*)

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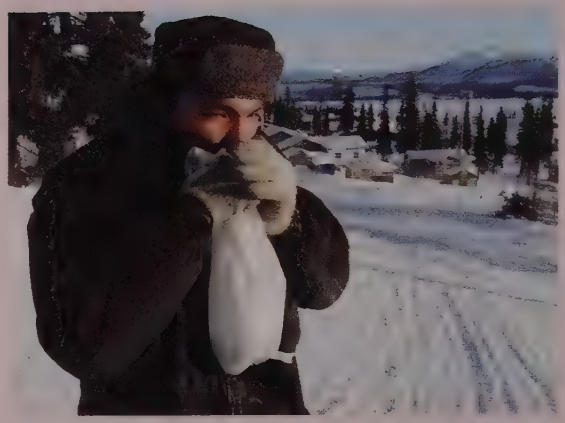
Labrador are a case in point. A nomadic people, the Innu traditionally relied on hunting and trapping for their livelihood. However, in the mid-1950s, shortly after Newfoundland and Labrador became part of Canada, the provincial and federal governments decided to gain tighter control of Innu land to encourage economic development. Government officials reasoned that to accommodate new roads, mines, lumbering operations, hydroelectric projects, and low-level flight-training facilities for NATO air forces, the Innu would need to be concentrated in permanent settlements. Government officials also believed that, to function in these new settlements, the Innu would need to learn practical and cultural skills associated with a modern industrial society. Consequently, governments put tremendous pressure on the Innu to give up their traditional way of life and settle in Davis Inlet and Sheshatshiu.

In the new communities, Canadian laws, schools, and churches strongly discouraged the Innu from hunting, practising their religion, and raising their children in the traditional way. Canadian hunting regulations limited access to their age-old livelihood. Priests are known to have beaten children who missed church or school to go hunting, introducing interpersonal violence into a culture that formerly knew little or none (compare Briggs, 1970). Teachers transmitted North American and European skills and culture, often denigrating Innu practices. At the same time, few alternative jobs existed in the new communities. Most Innu wound up living in despair and on welfare.

In the absence of work, and lacking the stabilizing influence of their traditional culture, a people long known for their nonviolence and cooperative spirit became victims of widespread family breakdown, sexual abuse, drunkenness, and alcohol-related illness. In Sheshatshiu in 2001, at least 20 percent of the children regularly got high by sniffing gasoline. In Davis Inlet, the figure was nearly 60 percent. The Innu competed with certain Brazilian tribes for the title of the world's most suicide-prone people (Hamlin and Brym, 2006; Samson, Wilson, and Mazower, 1999). Durkheim would not have been surprised, given the destruction of traditional Innu norms and values and the elimination of stable and meaningful patterns of social interaction in the family and at work; social solidarity was abysmally low.

In 2002, the federal and provincial governments decided to move the people of Davis Inlet and create a safer community for them in Natuashish, 15 kilometres away. The new community voted to abolish alcohol in 2008, but it is still smuggled into town, where a 1.2-litre bottle of rye has sold for $350. Some local mothers openly denounce people who supply alcohol and drugs, but substance abuse



Sniffing gasoline in Davis Inlet.
SOURCE: © The Canadian Press/Ryan Remiorz.

is still widespread and anti-abolitionists can still be found in the local government (Moore, 2010).

What can be done about the tragedy of the Innu? A 1984 study showed that a movement among the Innu to return to the land and to traditional hunting practices for up to seven months a year led to a dramatic improvement in health. They lived a vigorous outdoor life. Alcohol abuse stopped. Diet improved. Their emotional and social environments stabilized and became meaningful. Suicide was unknown (Samson, Wilson, and Mazower, 1999: 25).

Unfortunately, a big political obstacle stands in the way of a wide-scale return of the Innu to their traditional lifestyle. The governments of Canada and Newfoundland and Labrador will not allow it. A widespread Innu return to the land would conflict with government and private economic development plans. For instance, the Lower Churchill Falls hydroelectric project (the second-biggest hydroelectric project in the world) and the Voisey's Bay nickel mine (the world's biggest deposit of nickel) are located in the middle of traditional Innu hunting and burial grounds.

The Innu are vigorously attempting to regain control of their land. They also want to be able to decide *on their own* when and how to use Canadian health services, training facilities, and the like. Whether a compromise can be worked out between government and private plans for economic development and the viability of the Innu community is unclear.

Critical Thinking Questions

1. Why are many non-Indigenous Canadians reluctant to allow Indigenous Canadians to exercise more control over land and resources?
2. What are the dysfunctions of non-Indigenous control over land and resources for non-Indigenous Canadians themselves?

WHY SOCIOLOGY?

Renowned English sociologist Anthony Giddens wrote that we live in an era "suspended between extraordinary opportunity . . . and global catastrophe" (Giddens, 1982: 166). Nuclear, chemical, and biological disasters are more likely now than they were just a couple of decades ago. A whole range of environmental issues, deep inequalities in the wealth of nations and of classes, racial and ethnic violence, and unsolved problems in the relations between women and men continue to stare us in the face and profoundly affect the quality of daily life.

Despair and apathy are possible responses to these complex issues. But these are not responses that humans have often favoured. If it were our nature to give up hope, we would still be sitting around half-naked in the mud outside a cave.

People are more inclined to look for ways to improve their lives, and this period of human history is full of opportunities to do so. We have, for example, advanced to the point where, for the first time, we have the means to feed and educate everyone in the world. Similarly, it now seems possible to erode some of the inequalities that have always been with us and have always been the major source of human conflict. Students of sociology often pursue careers that further such goals.

Although sociology offers no easy solutions as to how the goal of improving society may be accomplished, it does promise a useful way of understanding our current predicament and seeing possible ways of dealing with it. You sampled sociology's ability to tie personal troubles to social-structural issues when we discussed suicide. You reviewed the major theoretical perspectives that enable sociologists to connect the personal with the social-structural. When I outlined the half-fulfilled promises of postindustrialism and globalization, you saw sociology's ability to provide an understanding of where we are and where we can head.

I admit that the questions raised in this book are tough to answer. Sharp controversy surrounds them all. However, I am sure that if you grapple with them, you will enhance your understanding of your society's—and your own—possibilities. In brief, sociology can help you figure out where you fit into society and how you can make society fit you. That, fundamentally, is sociology's goal.

TIME FOR REVIEW

1. What are some of the greatest social tensions in our time?
2. These tensions have emerged in a particular social context. What are the chief features of that context?

POSTSCRIPT: CAREERS IN SOCIOLOGY

Many people who want to improve the condition of humanity employ an arsenal of tactics, including voting for political parties they favour, contributing time and money to causes and organizations they support, petitioning governments and other authorities, running for office, participating in demonstrations, and so on. People with sociological training have an additional tool at their disposal. They can enjoy careers that allow them to engage in the formulation, implementation, and assessment of public policy—the laws, regulations, and programs that govern social life.

Annually in Canada, nearly 5000 people receive BA degrees with a major in sociology. A sociology BA improves one's understanding of the diverse social conditions affecting men and women, people with different sexual orientations, and people from different countries, regions, classes, races, and ethnic groups. Therefore, people with a BA in sociology tend to be attracted to jobs requiring good "people skills" and jobs involving the management and promotion of social change (see Table 1.2).

One way of seeing the benefits of a sociological education is to compile a list of some of the famous practical idealists who studied sociology in university. That list includes several former heads of state, among them Fernando Cardoso, who was president of Brazil; Tomáš Masaryk, chief founder and first president of Czechoslovakia; Edward Seaga, fifth prime minister of Jamaica; and Ronald Reagan, who was president of the United States. The former First Lady of the United States, Michelle Obama, majored in sociology. Before she became First Lady, she worked as commissioner of planning and development at Chicago's city hall and as the founding executive director of a program that prepares youth for public service. As First Lady, she continued to shape public policy regarding nutrition and childhood obesity.

The former vice-president of the Liberal Party of Canada and former president and vice-chancellor of York University in Toronto, Lorna Marsden, is a sociologist, as is her successor, Rhonda Lenton. Anthony Giddens, former director of the London School of Economics and adviser to former British Prime Minister Tony Blair, earned a graduate degree in sociology. So did the heads of two of Canada's

TABLE 1.2 Jobs Commonly Held by Canadians with Degrees in Sociology

Business
- actuary
- administrative assistant
- advertising officer
- computer analyst
- consumer relations
- data entry manager
- human resources specialist
- insurance agent
- journalist
- labour relations officer
- market analyst
- merchandiser/purchaser
- personnel officer
- production manager
- project manager
- public relations officer
- publishing officer
- quality control manager
- real estate agent
- sales manager
- sales representative
- technical writer

Community Affairs
- addictions counsellor
- adoption counsellor
- caseworker
- child development worker
- community organizer
- environmental organizer
- family planner
- fundraiser
- gerontologist
- group home programmer
- health outreach worker
- homeless/housing worker
- hospital administration officer
- housing coordinator
- marriage/family counsellor
- occupational/career counsellor
- public health worker
- rehabilitation worker
- residential planner
- social assistance advocate
- welfare counsellor
- youth outreach worker

Government
- affirmative action worker
- community affairs
- development aide
- foreign service worker
- human rights officer
- information officer
- legislative assistant
- personnel coordinator
- policy researcher
- urban/regional planner

Social Research
- census officer/analyst
- consumer researcher
- data analyst
- demographer
- market researcher
- social research specialist
- survey researcher
- systems analyst

Teaching/Education
- admissions counsellor
- alumni relations
- continuing studies officer
- post-secondary recruiter
- public health educator
- records & registration officer
- school counselling
- student developer
- teacher

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leading public opinion firms: Martin Goldfarb, chairman, president, and CEO of The Goldfarb Corporation; and Michael Adams, president of Environics. Alex Himelfarb, former clerk of the Privy Council (Canada's highest ranking civil servant), and Donna Dasko, a Canadian Senator, hold sociology PhDs, as did Daniel Hill, the first full-time director of the Ontario Human Rights Commission and former Ontario Ombudsman. All of these people enjoyed careers that nicely answer the question, "What can you do with a sociology degree?" You can improve the world.

SUMMARY

1. **What is sociology?**
   Sociology is the systematic study of human behaviour in social context. The sociological perspective analyzes the connection between personal troubles and social structures.

2. **Where are the social relations that surround you, permeate you, and influence your behaviour?**
   Social relations exist in micro- (small-scale, face-to-face), meso- (organizational, impersonal), macro- (large-scale, impersonal), and global (very large scale, cross-cultural, and cross-country) social structures. To varying degrees, people are aware of these structures, which therefore also exist in people's minds. Insofar as these social structures open up some opportunities and close off others, they influence human behaviour.

3. **How does sociological research seek to test ideas using scientific methods and thereby improve people's lives?**
   Sociological research begins with values—ideas about what is good and bad, right and wrong.

Values often motivate sociologists to define which problems are worth studying and to make initial assumptions about how to explain sociological phenomena. These explanations are theories—tentative explanations of some aspect of social life. Theories state how and why specific facts are connected. Research is the process of systematically observing social reality to test the validity of a theory. Sociological theories may be modified and even rejected through research. Thus, sociological research uses scientific methods to evaluate ideas but the desire to improve people's lives often motivates the research.

4. **What are the main theoretical traditions in sociology?**
Sociology has four major theoretical traditions. Functionalism analyzes how social order is supported by macrostructures. The conflict approach analyzes how social inequality is maintained and challenged. Symbolic interactionism analyzes how meaning is created when people communicate in micro-level settings. Feminist theories focus on the social sources of patriarchy in both macro-level and micro-level settings.

5. **How did sociology emerge out of the Scientific, Democratic, and Industrial Revolutions?**
The Scientific Revolution encouraged the view that sound conclusions about the workings of society must be based on evidence, not just on speculation. The Democratic Revolution suggested that people are responsible for organizing society and that human intervention can therefore solve social problems. The Industrial Revolution created a host of new and serious social problems that attracted the attention of many social thinkers.

6. **What are the main challenges facing society today?**
The Postindustrial Revolution is the technology-driven shift from manufacturing to service industries. Globalization is the process by which formerly separate economies, states, and cultures become tied together and people become increasingly aware of their growing interdependence. The causes and consequences of postindustrialism and globalization form the great sociological puzzles of our time. The tensions between autonomy and constraint, prosperity and inequality, and diversity and uniformity, are among the chief interests of sociology today.

QUESTIONS TO CONSIDER

1. Durkheim argued that the social solidarity of groups influences the suicide rate in those groups. How, if at all, do you think the social solidarity of groups influences the crime rate and the divorce rate in those groups? Why?
2. In what sense is sociology a science? How does sociology differ from a natural science, such as physics?
3. What kinds of sociological issues are best addressed by each of the four major theoretical traditions in sociology?

GLOSSARY

Altruistic suicide (p. 6) occurs in settings that exhibit high levels of social solidarity, according to Durkheim. Altruistic suicide results from norms very tightly governing behaviour.

Animism (p. 15) is a type of religion that believes humans, animals, plants, and natural phenomena have souls. As such, animism accords the beings and things that populate Nature a level of respect that monotheistic religions lack, teaching people to live in harmony with Nature, not to dominate it.

Anomic suicide (p. 6) occurs in settings that exhibit low levels of social solidarity, according to Durkheim. Anomic suicide results from vaguely defined norms governing behaviour.

Conflict theory (p. 14) generally focuses on large macro-level structures, such as the relations between or among classes. It shows how major patterns of inequality in society produce social stability in some circumstances and social change in others. It stresses how members of privileged groups try to maintain their advantages while subordinate groups struggle to increase theirs. It typically leads to the suggestion that eliminating privilege will lower the level of conflict and increase the sum total of human welfare.

Cultural hegemony (p. 17) involves the control of a culture by dominant classes and other groups to the point where their values are universally accepted as common sense.

The **Democratic Revolution** (p. 10) began about 1750. It suggested that people are responsible for organizing society and that human intervention can therefore solve social problems.

Dysfunctional consequences (p. 14) are effects of social structures that create social instability.

Egoistic suicide (p. 6) results from a lack of integration of the individual into society because of weak social ties to others.

Ethnomethodology (p. 29, Note 2) is the study of how people make sense of what others do and say in terms of norms that exist independently of individual social actors.

Feminist theory (p. 20) claims that patriarchy is at least as important as class inequality in determining a person's opportunities in life. It holds that male domination and female subordination are determined not by biological necessity but by structures of power and social convention. It examines the operation of patriarchy in both micro and macro settings. It contends that existing patterns of gender inequality can and should be changed for the benefit of all members of society.

Functionalist theory (p. 13) stresses that human behaviour is governed by relatively stable social structures. It underlines how social structures maintain or undermine social stability. It emphasizes that social structures are based mainly on shared values or preferences. It suggests that reestablishing equilibrium can best solve most social problems.

Globalization (p. 21) is the process by which formerly separate economies, states, and cultures are becoming tied together and people are becoming increasingly aware of their growing interdependence.

Global structures (p. 8) are patterns of social relations that lie outside and above the national level. They include international organizations, patterns of worldwide travel and communication, and the economic relations between and among countries.

The **Industrial Revolution** (p. 10) refers to the rapid economic transformation that began in Britain in the 1780s. It involved the large-scale application of science and technology to industrial processes, the creation of factories, and the formation of a working class.

A **latent function** (p. 14) is an invisible and unintended effect of social structures.

Macrostructures (p. 8) are overarching patterns of social relations that lie outside and above our circle of intimates and acquaintances. Macrostructures include classes and power systems, such as patriarchy.

A **manifest function** (p. 14) is a visible and intended effect of social structures.

Mesostructures (p. 8) are patterns of social relations formed in organizations whose members are often not intimately acquainted and who often do not interact face to face. Social organizations such as colleges, bureaucracies, and political parties are examples of mesostructures.

Microstructures (p. 8) are the patterns of relatively intimate social relations formed during face-to-face interaction. Families, friendship circles, and work associations are all microstructures.

Patriarchy (p. 8) is the traditional system of economic and political inequality between women and men.

The **Postindustrial Revolution** (p. 21) refers to the technology-driven shift from manufacturing to service industries and the consequences of that shift for virtually all human activities.

Poststructuralism (p. 17), a school of thought that originated in mid–twentieth-century France, denies the stability of social relations and of cultures, their capacity to always shape how people think and act, and their categorization of social and cultural elements as binary opposites.

The **Protestant ethic** (p. 18) is the belief, originating in the sixteenth and seventeenth centuries, that religious doubts can be reduced, and a state of grace ensured, if people work diligently and live ascetically. According to Weber, the Protestant ethic had the unintended effect of increasing savings and investment, thus stimulating capitalist growth.

Queer theory (p. 19) argues that people's sexual identities and performances are so variable that such conventional labels as "male," female," "gay," and "lesbian" fail to capture the instability of sexual identities and performances that characterize the lives of many people.

Research (p. 12) is the process of systematically observing reality to assess the validity of a theory.

The **Scientific Revolution** (p. 10) began about 1550. It encouraged the view that sound conclusions about the workings of society must be based on solid evidence, not just on speculation.

Social constructionism (p. 19) argues that apparently natural or innate features of life are often sustained by social processes that vary historically and culturally.

Social solidarity (p. 6) refers to (1) the degree to which group members share beliefs and values, and (2) the intensity and frequency of their interaction.

Social structures (p. 7) are relatively stable patterns of social relations.

The **sociological imagination** (p. 9) is the quality of mind that enables a person to see the connection between personal troubles and social structures.

Sociology (p. 4) is the systematic study of human behaviour in social context.

Symbolic interactionism (p. 18) focuses on face-to-face communication or interaction in micro-level social settings. It emphasizes that an adequate explanation of social behaviour requires understanding the subjective meanings people attach to their social circumstances. It stresses that people help to create their social circumstances and do not

merely react to them. By underscoring the subjective meanings that people create in small social settings, symbolic interactionism validates unpopular and non-official viewpoints, increasing our understanding and tolerance of people who may be different from us.

A **theory** (p. 12) is a tentative explanation of some aspect of social life that states how and why certain facts are related.

Values (p. 13) are ideas about what is right and wrong, good and bad.

NOTES

1. You will find more detailed discussion of these theories throughout the book. For example, on functionalism, see Chapters 11 and 12. On conflict theory, see Chapters 7, 10, 12, and 15. On symbolic interactionism, see Chapters 4 and 13. On feminism, see Chapters 5, 10, and 15.
2. By emphasizing how social reality is constructed during interaction, symbolic interactionists downplay the importance of norms and understandings that precede any given interaction. **Ethnomethodology** tries to correct this shortcoming. Ethnomethodologists study how people make sense of what others do and say but stress that norms exist independently of individual social actors. Indeed, in the ethnomethodological view, everyday interactions could not take place without pre-existing shared norms. Say you pass an acquaintance on the street who offers a friendly "How are you?" If you proceed to outline in detail your financial situation, your love life, interesting developments at work, and so on, the acquaintance will quickly become annoyed. Most people expect "How are you?" to be answered with an equally brief reply. Violate the norm, and communication quickly breaks down (Garfinkel, 1967).

CHAPTER 2

RESEARCH METHODS

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Identify various sources of knowledge and know what is distinctive about each source.
- Appreciate that, like other forms of knowledge, science can be wrong, but that science uses methods of gathering theoretically relevant evidence designed to minimize error.
- Contrast the natural and social sciences and appreciate that what makes the social sciences unique is their study of meaningful human action.
- Recognize key features of the research methods that sociologists use to gather evidence ethically and robustly to test theoretical claims.
- Compare the strengths and weaknesses of qualitative and quantitative methods.
- Know when it is more appropriate to use different sociological methods of investigation.
- Appreciate how research adds to our knowledge of the social world and how it expands opportunities and options by helping to solve social problems.

INTRODUCTION

Social research involves systematic, purposeful study. The systematic nature comes, in part, from the methods sociologists use. Fundamental to these methods is the careful, ethical collection of evidence. However, only evidence relevant to theoretical ideas is useful. Strong sociological study integrates sound theory with careful methods.

This chapter introduces you to the principles of research methods. I begin by outlining basic assumptions of social science research, including assumptions about personal values or bias, the nature of facts, and the sources of knowledge. Next, I explain how the subject matter of the social sciences—people—differs from the objects of inquiry in the natural sciences (e.g., molecules). People studying people adds complexity to social research. Methods of observation and questioning lie at the heart of social research. I review the strengths and weaknesses of each in the final section of the chapter.

SOCIAL SCIENCE AS A SOCIAL PRACTICE

In 2005, 14 years after his murder conviction and following new DNA tests, James Driskell had his charges quashed. David Milgaard endured prison longer, but after serving 23 years in jail for murder, he too was exonerated. Again, DNA testing was instrumental. Courts had weighed evidence that juries believed demonstrated guilt. Circumstantial evidence, filtered by personal expectations and values, had led justice astray. Subjective judgments had seriously compromised these men's lives.

Gold (1998) claimed that "good science" exonerated them, but it was "not science" that helped convict them. But what makes for "good science," the kind of science on which we can make serious decisions?

Wrongful convictions are rare. The criminal justice system minimizes such error through rules of evidence and presumptions of innocence. Likewise, science is organized to minimize error. Science is not perfect, however, and it is important not to put scientific practice on a pedestal, as though it were somehow immune to human foibles. Like all human activities, the social practice of science is influenced by subjectivity.

Science needs subjectivity but it cannot be overwhelmed by it. Subjectivity is important to certain phases of science but detrimental to others. Understanding the complexities of scientific methods requires delineating when subjectivity is beneficial and when it is not. But just what is subjectivity? Most people understand our personal values and expectations as a core part of subjectivity. Frequently, people separate the world into facts and values; the real and objective versus the personal and subjective.

Sociological theories were first proposed in the nineteenth century as secular accounts of rapid social change. By the early twentieth century, systematic methods for empirically testing hypotheses were being introduced.

SOURCE: Carol Wainio, *We Can Be Certain*, 1982, acrylic on Masonite, 48" × 96". Courtesy Carol Wainio.

What complicates this is perception. Reality exists, certainly—it is no figment of the imagination. However, our values and expectations filter reality. While the saying "What you see is what you get" has an intuitive appeal, we know the claim is false. It exaggerates. Other things, especially our expectations and values, affect what we see.

Here is an example. The Sun is real. It is no figment of our imagination. We commonly speak about "sunsets" and "sunrises." But these terms deceive. Although we have all watched a "sunset," the Sun does not set. Our language conditions us to think of a moving Sun, but Earth rotates around the Sun. Earth's spin creates the *illusion* of a moving Sun.

Values and expectations influence our perceptions, but they do not completely determine what we see. This is critical. The *extent* to which values and expectations influence what we see is debatable, but secondary. The key point is that *if* our perceptions of reality can be affected by our values, how can scientists ever know for certain that what they "see" is true? Put another way, if observation cannot serve as a rock-solid foundation of scientific knowledge, how is the practice of science best understood?

An important claim of this chapter is that reality does not exist as some neutral scientific judge. Pure observation does not rule supreme. To think of an individual scientist as a detached, arm's-length observer of the physical or social world, making observations to test ideas, is to profoundly misunderstand science. Science is a complex social activity, and the methods of scientists are designed in the face of such complexity. Here is an illustration of how values and expectations creep into scientific work.

In high-school biology classes, you learned about Gregor Mendel. Mendel was the father of genetics. He cross-fertilized pea plants and noted that inherited traits followed consistent numerical ratios (i.e., the expression of dominant and recessive genes). R. A. Fisher, while a Cambridge University undergraduate, demonstrated that Mendel's results seemed fabricated. The likelihood that Mendel produced results conforming so closely to his hunches about heredity was, Fisher showed, in the order of 1 in 30 000.

Mendel may have been lucky, producing possible but highly unlikely results. Alternatively, Mendel may have unconsciously misclassified some pea plants. Classifications made by Mendel were not clear-cut, so his experimental results may have tilted in favour of his preconceived ideas. In this vein, Fisher (1966 [1936]: 123) claimed that Mendel's results were a "carefully planned demonstration of his conclusion."

"Observer bias" (making unconscious mistakes in classifying observations) is now commonly discussed as a methodological danger. Mendel did not clearly and publicly describe his procedures. Although it is impossible to know exactly why his results came out as they did, his ideas about genetics have proven invaluable.

Good research methods are designed to minimize the types of errors attributed to Mendel. These methods seek to minimize the biasing effects that values and expectations can have on scientific research.

MINIMIZING BIAS IN SOCIAL SCIENCE

Sociologists apply scientific practices to the study of human society. These practices incorporate several ways of reducing bias, especially the twin pillars of public (open) scrutiny and skeptical reasoning. Scientific ideas become provisionally accepted only after scrutiny by the scientific community. Individual scientists do not just proclaim a link between family background and children's school success or between greenhouse gases and global warming; these links must be demonstrated by presenting research findings at scientific conferences, subjecting findings to peer review, and ensuring that research results can be replicated. The scientific community is organized to promote critical scrutiny.

Scrutiny is not enough, however. If the scrutiny is not rigorous and probing, it is useless. Scientific practice also encourages skeptical reasoning. New ideas are accepted only after critical examination and questioning. Examples of this questioning could include: Does something other than greenhouse gas cause global warming? If greenhouse gases do cause global warming, exactly how does the causal process work? This process of critical questioning is how good science is conducted.

Scientists are also trained to minimize the influence of their personal values and expectations on their research results. They work to root out error in reasoning and observation. So, for example, scientists learn to collect and analyze information according to rules that reduce the risk that results will be affected by bias. Much of the latter part of this chapter focuses on these research techniques.

Science has prospered because of healthy skepticism and public scrutiny. Both the natural and social sciences have improved our world by helping to curtail malaria, improving the life chances of children with

disabilities, and reducing gender inequity. Scientists are not infallible saints, however. The scientific community is not some sacred haven where only truth and enlightenment reign. Fraud and deceit are also part of science (Park, 2000).

Here I need to pause to correct a possible misinterpretation about the role of values and expectations. I have portrayed these as "problems." This is too one-sided. Science would be substantially weaker, if not impotent, without values and expectations. Science is soaked through with personal judgments. Mendel's brilliance came from his personal expectations about the role of dominant and recessive genes. Mendel provided a new, visionary way of seeing the world.

Expectations and values compete with scientific knowledge. Without them the spark of creativity and passion would be low, but with them we can be led to false conclusions (as judges and juries are occasionally misled). Put differently, objectivity and subjectivity each play an important role in science, including sociology. **Objectivity** stresses that observations should be free of the distorting effects of a person's values and expectations. Conversely, without people's subjective championing of their own visions, we would have little creativity. A hallmark of science is its creativity. Mendel's was a beautiful solution to the mystery of inheritance, even if he may have been too exuberant in his experimental claims.

Science depends on both the creativity of new explanations and the assessment of whether these explanations are plausible. In sociology, this dual character resides in a division between theory (understanding and explanation of how the world works) and methods (ways of assessing the veracity of theory).

This chapter is about gathering and assessing evidence. It explores how sociologists work within the rules and ethics of the scientific method. First, however, I contrast scientific knowledge with other forms of knowledge. The discussion moves next to the steps involved in the sociological research process. I then describe the main methods of gathering sociological data and the decisions that have to be made during the research process. Finally, I return in the conclusion to the role of subjectivity in research.

SCIENTIFIC VS. NONSCIENTIFIC THINKING

To differentiate good and bad science, consider what characterizes scientific thinking. Our ancestors knew many things about the world. Much of this was custom or common sense—when to plant, what to plant, where to plant. Religious knowledge held centre stage. Creation stories of how we came to be on Earth were powerful tales that gave coherence to people's lives. Religious doctrine and common sense remain dominant in many societies, but scientific ways of knowing have increasing authority, especially in industrial countries.

What characterizes this scientific way of knowing? A key contribution came from David Hume (1739). He disputed the popular argument of his day that science begins with observation. Hume argued that no matter how many observations you make, you cannot correctly infer your next observation. This is the *problem of induction.* Put more graphically, no matter how many white swans you see, you cannot logically infer that all swans are white. However, observing one black swan is sufficient to refute the claim that all swans are white.[1] Hume was railing against Francis Bacon's claim that observation was the bedrock of science. For Hume, the collection of "facts" is useless unless you understand how to interpret them.

Facts do not speak for themselves. Blue mould growing on spoiling food is a fact of life. It was only in 1928, however, that Alexander Fleming recognized this blue mould as a potent medical tool. Many people had seen blue mould, but only Fleming understood it as penicillin. Science is not a collection of facts.

Facts are bits of evidence, information that we can verify using our senses. Because trillions of bits of human activity might be taken as facts, how do we select what should count as evidence? Sociological theory provides guidance for the hunting and gathering of facts. Evidence is gathered to test ideas, hunches, or theories. Only selected bits of human activity are used as evidence. Those selected bits are chosen because they relate to a sociologist's theory about how the world works.

In the twentieth century, Sir Karl Popper's (1977 [1934]) ideas about falsification improved this thinking. As he claimed, observations refuting a well-conceived idea are always more important than evidence supporting a theory (e.g., observing one black swan was more important than observing yet another white swan). For Popper, science does not start by gathering facts. It starts with a question or hunch, or in his words, "a well-conceived conjecture."

Recall two core ideas I noted about scientific thinking: public scrutiny and skeptical reasoning.

Popper added the principles of testability and uncertainty. Testability is easy to understand. For an idea to be scientific, it must have testable implications; it must be falsifiable (i.e., *if* an assertion is false, this can be demonstrated by evidence).

The principle of uncertainty may be more difficult to accept. Many people misunderstand science as a doctrine of certainty. As Park (2000: 39) puts it, "many people are uneasy standing on . . . loose soil; they seek a certainty that science cannot offer." As Hume argued centuries before, observations cannot be the bedrock of science because of the problem of induction. Equally, however, science cannot proceed, as Popper correctly argued, without the possibility of observations that could refute a scientific claim. Observations based on well-reasoned methods can ferret out error and misunderstanding, although these same observations cannot guarantee universal truth or perfect certainty.

UNDERSTANDING SCIENCE SOCIOLOGICALLY

One of the most influential books of the twentieth century was Thomas Kuhn's (1962) *The Structure of Scientific Revolutions.* Before Kuhn, many people held a "brick-building" conception of science. They thought that individual scientists contributed to building a structure called *scientific knowledge*, one brick at a time. As scientific knowledge accumulated, the structure became taller and sturdier.

Kuhn challenged this view. First, he held that science developed through contributions from a community of scholars who used "paradigms" as guiding tools about how the world is organized (Mendelian genetics is such a paradigm). Paradigms guide questions and answers. Evidence not fitting a paradigm is ignored. However, if significant anomalous evidence accumulates, a "scientific revolution" results. Scholars opt for a new paradigm. The transition from Newton's mechanics to Einstein's relativity illustrates a paradigm shift, or a scientific revolution (Kleppner and Jackiw, 2000).

Second, Kuhn proposed a discontinuous view of scientific progress. The community of scholars did not keep building the Newtonian structure but shifted to a new structure defined by the Einsteinian paradigm. This discontinuous view of scientific progress also influenced debates about truth. Earth as the "third rock from the Sun" we now hold as a fundamental truth. But our ancestors were equally convinced that Earth was the universe's central rock. In the future, will our "third rock" conception seem equally odd? Kuhn's view suggests that truth is contextual. A new paradigm establishes a new context, showing us that beliefs we once held to be true were naive or misleading (like the belief in a flat Earth).

Finally, the argument about community was sociologically compelling. In Kuhn's hands, the practice of science was not understood as individual scientists ruthlessly questioning all ideas. To the contrary, paradigms provided a set of convictions about how the world was ordered. With faith in a paradigm, a community of scholars searched for what they were convinced existed. Paradigms had a disciplining effect, focusing attention on a delimited set of questions and answers. Notice also that Kuhn emphasized that scientific change was not gradual, but sudden (revolutionary) and that the change was organized (structured).

NATURAL VS. SOCIAL SCIENCE

Sociologists and chemists share many scientific practices. The research methods of both disciplines help in understanding and explaining why certain patterns recur. Furthermore, values are important in this process because they underlie the creative imagination so central to scientific puzzle solving. Values also have the potential to bias or distort observations, and both the natural and the social sciences guard against distortion. I understand the scientific method as a set of practices for testing knowledge claims. Both chemists and sociologists are doing science.

There is, however, a profound difference between the subject matter of the natural and the social sciences: Bacteria don't blush. This phrase neatly captures the key distinction. Human beings are conscious and creative; we can think, act, reason, and decide. As sociologists, we study "ourselves." Bacteria, having no knowledge of social norms, do not blush when exposed to the beam of an electron microscope. Bacteria cannot think, act, reason, or decide.

The single most important difference is that, unlike chemists, sociologists study **meaningful action**. For example, bacteria may not blush when studied, but people often react self-consciously when observed. To study love, friendship, or charisma depends on learning something about the meanings people ascribe to actions. This has advantages and disadvantages. Unlike chemists, sociologists can ask questions of the people whom we study (bacteria

don't talk either). But this advantage can also be a disadvantage: Interpreting people's answers is not easy.

TIME FOR REVIEW

1. How do values and expectations positively and negatively influence research?
2. How do sociologists attempt to weed out error and misinformation in the pursuit of knowledge about the social world?
3. What roles do testability, falsification, and uncertainty play in advancing sociological knowledge?
4. What does the phrase "Bacteria don't blush" illustrate by way of differentiating between the social and natural sciences?

METHODS OF SOCIAL RESEARCH

EXPLANATION

Sociologists have shown repeatedly that family background strongly influences the years of schooling people complete. Children raised in poverty tend not to go as far in school as do children from upper-class families. Although research demonstrates a link between family background and educational attainment, this link is, as I noted earlier, descriptive, not explanatory. I have offered no reason for the link. I have noted a potential cause (family background) and an effect (years of schooling), but I have failed to identify a mechanism through which this implied causal process might operate. An **explanation** would be judged adequate only if it could show how family background actually influences educational outcomes.

The mere association or correlation between social origin and educational destination does not prove causality. The relationship between smoking and lung cancer is a good example of the rule that *correlation does not prove causation.* Smoking has long been linked to lung cancer, but only in the past few decades have we clarified the causal mechanisms underlying this correlation. Cigarette companies, especially, have argued that the presumed connection was **spurious**, meaning that something other than smoking caused lung cancer. Accumulated evidence and more precise understanding and observation of the underlying modes of transmission have established that the link is causal.

To return to the earlier example, for a **causal relationship** to exist between social origin and educational destination, four criteria need to be satisfied: association, temporality, nonspuriousness, and the existence of mechanisms:

1. Changes in social origin have to be *associated,* or correlated, with changes in educational destination.
2. Social origin must *temporally* precede educational destination.
3. To conclude the link is causal, we want to know that *no other factor(s)* is/are causing the linkage.
4. Finally, we want to know how social origins affect educational destinations: What are the *mechanisms* that create this linkage?

For an expanded discussion of correlation and causation, please see the learning path for this chapter in MindTap.

We might try to explain the mechanisms linking family and schooling in several ways (Davies and Guppy, 2018). An obvious factor is money. Although public schooling is free, costs are incurred for field trips, tutoring, and a host of other activities. Children living in poverty may remain in school for fewer years than their upper-class peers because of these costs.

Other factors may be at work as well. Many skills and values taught in school may be more readily grasped by children from upper-class families, not because these children are smarter than children living in poverty, but because the home environments of the children may expose them to different skills and values. The classroom culture may be more like the culture in upper-class homes (e.g., abstract word games are valued, reading and music are prized) and these children may therefore be advantaged.

The first explanation is largely about money and material resources. The policy implications of this explanation point toward eliminating or reducing the costs of schooling. The second explanation points toward cultural factors in the home (e.g., reading material) as a reason for the family–school link. This explanation has influenced policies related to compensatory education programs designed to help disadvantaged children by giving them educational enrichment (Guppy and Davies, 2009).

The mechanisms by which causes have effects are essential for adequate explanation (Gross, 2009). You could think of these mechanisms as the social "cogs and levers" greasing the wheels that link causes with effects. Furthermore, multiple causes are involved in social-scientific explanations; a single cause rarely provides a sufficient explanation.

UNDERSTANDING

Sociologists must not be content merely to offer explanations for why a particular relationship exists. These explanations are often sterile unless they also address the meaningfulness of human activity. People make the social world happen, and in doing so they give meaning to their actions and to the actions of others. A failure to address these meanings would leave sociology underdeveloped.

It is no simple matter, however, to understand what someone or some group means by their actions or utterances. One way to think about **understanding** is as follows. The first time I saw a cricket match, I could not fathom what was happening. To the extent that I have come to understand this complex social activity, I have learned *how to proceed with the activity.* To understand a cricket match means being able to participate fully in the activity, knowing what others mean by their actions and utterances, and knowing how others will interpret my actions and utterances.

A fundamental social process, called *taking the role of the other*, nicely captures this idea of understanding. By imagining yourself in another person's role, you come to appreciate someone else's point of view. You come to understand, to reflect on, that person's ideas and issues. I do not mean that you must become Lady Gaga to understand her; that would be impossible. Instead, sociologists focus on the web of relations in which people interact, paying attention to how people understand and interpret the views of others. They pay attention to "the definition of the situation," to the meanings of the people involved.

Erving Goffman's work in an insane asylum (as it was called then) illustrates sociological understanding (Goffman, 1961). Goffman was interested in how patterns of social activity in the asylum were organized. He came to see the mental hospital from the patients' point of view. By dispensing with the medical categories and scientific labels assigned to patients, Goffman began to understand the ways in which patients worked cooperatively to produce a coherent social structure. He learned to appreciate how the patients defined the routine activities of the asylum and how they coped with institutional procedures that denied them privacy and stripped them of their personal identities (e.g., by issuing institutional clothing and confiscating personal objects).

Goffman (1961: 129) also learned about what he calls the "careers" of patients with mental illnesses: "Persons who become mental-hospital patients vary widely in the kind and degree of illness that a psychiatrist would impute to them. . . . But once [in treatment] they are confronted by some importantly similar circumstances and respond to these in some importantly similar ways. Since these similarities do not come from mental illness, they would seem to occur in spite of it." Although social life on the "inside" might seem unique or even bizarre at first, Goffman argues that anyone, patient or researcher, would, in time, come to find it much like many other communities in which he or she has participated, possessing an identifiable social organization and rhythm of activity.

Returning to the education example, explanations of high-school dropout rates that ignore the attitudes and values of the people who drop out are one-sided. An appreciation of the experiences of people who drop out is essential to a more complete account of the schooling process. Especially important here is the resistance of students to authority, often expressed

Explanations of high-school dropout rates that ignore the attitudes and values of those who drop out are one-sided. An appreciation of the experiences of students who drop out is essential to a complete account of the schooling process.

SOURCE: © iStockphoto.com/Rosmarie Gearhart.

through music and clothing. Such resistance is not some idiosyncratic expression of random individuals, but represents part of a youth subculture that must be understood by anyone who wants to alter the schooling process to make it better. How young school resisters define the situation of schooling is important to a full appreciation of dropping out.

Understanding and explanation work together. Although explanations of dropping out that ignore student values are deficient, merely reporting the stories of young resisters would be equally vacuous. A full appreciation of dropping out, or of any other social activity, requires both understanding and explanation.

Is it enough to just understand and explain? Most sociologists, indeed most scientists, are progressive in the sense of wanting to see a better, more just world—a world with less human suffering and misery. Should sociologists be both researchers and activists? Put differently, should scholars act on their research findings to promote social change or should activism and political change be separate activities? Especially for scholars working in such areas as poverty, human rights, or racism, the urge to promote social change is pressing. Feminist scholars have been particularly adept at bridging the divide between research and social change advocacy.

Feminist research has done so by engaging in scholarship that disrupts traditional or accepted knowledge. Sociologists often ask questions from the vantage point of those on the margins of society (for example, the poor, the dispossessed, the victim). Feminist research has been pivotal in challenging traditional knowledge that excludes women, ignores discrimination, or accepts the status quo as legitimate and proper (Smith, 2005). Further, feminist methodology has stressed minimizing harm and raising ethical standard in research.

ETHICS IN SOCIAL RESEARCH

Three groups share an interest in the conduct of sociological research: the sociological investigator, the people being observed or questioned, and the members of society who enable (e.g., through taxes), and potentially benefit from, such research. Sociologists have a self-interest in their research, but it is imperative that proper weight also be given to the interests of research participants and the public. Although primary responsibility for the rights and welfare of both participants and the public must reside with the sociologist as researcher, the self-interest of the sociologist requires that there is an arm's-length review of research protocols to ensure the protection of all interested parties (see the Critical Sociology feature, The Relationship between Power and Knowledge in Research).

The typical risks in social research are of two types: risks to individuals and risks to communities or social groups. Understanding individual harm is fairly straightforward. Social research can cause harm by, for example, asking people questions that remind them of trauma they once experienced. However, social research can harm communities or groups by, for example, reinforcing stigmas and stereotypes or supporting policies that help some groups at the expense of others (e.g., Indigenous peoples). Who sponsors the sociologist's research is an important issue, especially in the latter context.

Ethically responsible research must minimize risks. Informed consent is key. Researchers must ensure that people not only consent but that they consent voluntarily after knowing what the research entails. I comment further on ethical issues in discussing a range of research projects in the remainder of the chapter (see also Haggerty, 2004).

TIME FOR REVIEW

1. What are the main differences between explanation and understanding?
2. What are the four conditions for causality that would need to be satisfied if we claimed that gender contributed causally to differences in occupational income?
3. Some research ethics boards at hospitals, schools, and universities have members of the general public as members. What are the advantages and disadvantages of such a practice?

TECHNIQUES OF SOCIAL RESEARCH

Sociologists have many techniques for gathering evidence. I will review three of the most important: experiments, survey research, and qualitative methods. As you read my accounts of research procedures, keep asking yourself these questions: How do sociologists develop insights about, or knowledge of, the social world? How do they come to know what they claim to know? What methods do they use and how believable are the results generated by these methods? Have these research studies adequately addressed technical issues?

Critical Sociology

THE RELATIONSHIP BETWEEN POWER AND KNOWLEDGE IN RESEARCH

Chemists examine molecules through scanning electron microscopes. Social scientists study people. Sometimes sociologists are able to study people unobtrusively by examining documents like court records or administrative data such as school grades. Most often, though, social scientists want evidence that requires them to question or observe people directly. Such inquiry can involve a power imbalance because researchers may have authority, education, and resources that research subjects lack.

This power imbalance can be dangerous. Consider, for example, experiments conducted on Indigenous students attending residential schools in Canada. From 1876 to 1996, about 150 000 Indigenous children were removed from their families, placed in boarding schools, and forced to abandon their culture. Often mistreated and neglected, some students were also used as "guinea pigs" in experiments designed to study the effect of nutritional deprivation (Mosby, 2013). The students were powerless to resist such harm.

Sadly, such abuse was not uncommon; only in the last half-century has much thought been given to the rights of human subjects in research. *Studying down*—that is, researching people who lack the authority, education, and resources of the researcher—has always been far easier than *studying up*—that is, researching people in positions of power and privilege.

Research ethics have been tightened in recent decades. All research must now pass through careful adjudication to ensure that research participants are not harmed and that they voluntarily consent to participate. This has helped to protect research subjects, especially those who are members of disadvantaged groups. Feminist scholars advocate "participatory action research" that empowers research participants by including them more directly in steering research so that it meets the needs of those being studied as well as those doing the studying (Masuda et al., 2012).

Critical Thinking Questions

1. Knowledge is often said to be power. In what sense do power differences in research suggest that power is knowledge?
2. What are the pros and cons of including research participants (subjects) in designing research questions and conducting research? Do the pros outweigh the cons or vice versa?

EXPERIMENTS

Experiments are the hallmark of scientific research and are commonly, though inaccurately, equated with science itself. Experiments are useful because they enable researchers to isolate causes and effects. By no other method can researchers determine causation so precisely. Furthermore, experiments exemplify a key hallmark of any good research—the ability to compare and contrast. An example is the best way to illustrate these points.

The shape of families has changed recently. At one time, the family was understood as a married couple—a man and a woman—with children. No longer. Single-parent families have become more prevalent, as have common-law unions and same-sex couples. Nathan Lauster and Adam Easterbrook (2011) examined how successful these new types of families were in securing rental housing and, if they encountered resistance in renting, what the likely source of the resistance was.

A landlord could choose to rent to people in some types of family and not others. Landlords might judge new types of families as morally suspect or as violating the traditional family norms of existing tenants. Landlords also face the risk of damage to their premises and failure to being able to collect rent, and they may judge people in new family types as riskier, less stable, or more likely to miss rent payments. These perceptions might vary with a landlord's previous experience with similar types of families, so there may be neighbourhood effects. That is, in neighbourhoods where people in new family forms are already renting, there might be less discrimination than in neighbourhoods where the traditional family form still dominates.

To explore these questions, Lauster and Easterbrook chose to conduct a field experiment. They compared the ability of people in different family configurations to find rental accommodation in various neighbourhoods.

The field experiment worked as follows. Websites like craigslist.ca and kijiji.ca carry rental advertisements. The researchers emailed landlords asking about rentals but in their messages they varied

the type of family making the inquiry. The family types were: male–female couple; male–male couple; female–female couple; female adult, male son; male adult, male son. Five versions of the scripted email, with appropriate variations, read as follows:

> Hi, my name is [Matt/Melissa/Kate/Kevin], and [appropriate form; e.g., my son and I] saw your listing for an [apartment/suite] on [website]. We are nonsmokers and don't have any pets [or children, if appropriate]. I'm a teacher and [she's/he's enrolled in a professional program; or, he's enrolled in third grade]. Please let us know if the [apartment/suite] is still available and if we can view it. Thanks, [names of two people].

The scripted emails were sent to landlords who had advertised a one- or two-bedroom unit for less than $1700/month. Because the types of families already living in a neighbourhood might influence responses, Lauster and Easterbrook targeted nine different neighbourhoods. For example, they reasoned that in neighbourhoods with higher concentrations of same-sex couples, discrimination against same-sex couples would likely be lower than in other neighbourhoods. By including nine neighbourhoods, the researchers were also able to see whether neighbourhood characteristics such as percentage of gay couples or lone-parent families, the population under 15, and average monthly rent affected their findings.

The scripted emails ensured that all landlords received identical inquiries, save for the change in type of family. Sending emails asking about every one- or two-bedroom rental property advertised on a given day was ruled out because that would lead to a possible duplication of requests to the same landlord. They used a randomly selected set of advertisements and staggered their requests over two weeks to ensure that no bias crept in from differences in the day of the week they inquired.

The results showed that heterosexual couples and female couples received the most positive responses (about 62 percent each), while male couples received positive responses only about 50 percent of the time. Single parents, either mother or father, received positive responses about 54 percent of the time.

Lauster and Easterbrook also wanted to know if the likelihood of a positive response to their email varied by neighbourhood. For example, did male couples also receive significantly lower positive responses to their inquiries when the rental units were in traditionally gay neighbourhoods? The answer was no. As expected, male couples were more likely to receive positive responses when the email was directed to rental units in an area where male couples typically lived. While, overall, male couples experienced the greatest rental discrimination, it was lessened in neighbourhoods where many gay men already lived. Female couples did not experience as much rental discrimination.

By dissecting the Lauster and Easterbrook experiment, we can examine more carefully several key research design features. The researchers began with a **hypothesis**—an unverified but testable knowledge claim. They hypothesized that "type of family" would affect "rental discrimination," with heterosexual couples more likely to receive favourable responses than the other family types.

To test this hypothesis, Lauster and Easterbrook examined the relationship between two **variables**. A variable is a measurable concept that can have more than one value. Age is a concept we measure by years since birth. In the language of research, Lauster and Easterbrook were interested in how type of family, their **independent variable** (the hypothesized cause), influenced rental discrimination, their **dependent variable** (the hypothesized effect). Lauster and Easterbrook used five different conditions or "treatments" for their independent variable: heterosexual couple, male couple, female couple, single mother, and single father. They reasoned that the likelihood of a positive response to the email about renting depended on which type of family the email was from. The dependent variable had three values: a positive response (yes, please come and see the unit), no response, or a negative response (rented already).

How did Lauster and Easterbrook know that only type of family and not another factor, such as a household size or social class, influenced rental discrimination? They were confident in their conclusion because, by design, they knew that landlords received fictitious emails where only the type of family differed. By randomly sending the email to different landlords and referencing one of the five family conditions, they could compare how landlords responded, knowing that family type was the only factor that could have systematically affected landlord responses. Household size was identical in each email. Social class was also constant since the reference was always to a teacher.

Random assignment or **randomization** lies at the heart of experimental design. Using a random

procedure, such as flipping a coin or rolling a die, researchers assign people to an experimental condition based on chance. If the coin comes up heads, a person is placed in experimental condition one; if the coin comes up tails, the person is assigned to condition two. Although in Lauster and Easterbrook's case, landlords differed by sex, age, income, and so on, the emails went to an approximately equal number of female and male landlords, landlords with different annual incomes, and so on. The experiment was designed to ensure that the landlords receiving each type of email constituted a randomized group. Lauster and Easterbrook used this random assignment process to ensure that the only systematic difference among the five conditions was family type.

Sociology experiments are relatively rare, largely because many social processes that interest sociologists are not amenable to experimentation. It is also the case that results from experiments might not be generalizable to wider populations. For example, in Lauster and Easterbrook's field experiment, it is not immediately obvious how their results might apply to cities of different sizes or to more rural regions. Technically, this generalizability issue is known as **external validity**. Ethical and practical problems also limit the use of experiments.

Notice as well an ethical dilemma involved in this research. Landlords were duped; they didn't know they were involved in a research study. My own view is that learning about discrimination in rental housing is valuable and although some randomly selected landlords unknowingly did some extra work in dealing with the email, there was no chance of this causing harm. The ethics review board involved thought that on balance this was acceptable practice. What do you think? Was this deceit justifiable?

The landlords did not know they were part of an experiment because, as mentioned earlier, when people know they are being studied, they often become self-conscious. Being studied may influence behaviour. This was demonstrated in productivity experiments conducted first by Roethlisberger and Dickson (1939) at the Western Electric Company's Hawthorne factory. They found that productivity (the dependent variable) increased when they brightened the lighting but also when they dimmed the lighting. People simply worked harder whenever the research team was studying them! The term **Hawthorne effect** is often used when referring to changes in people's behaviour caused by their awareness of being studied.

One field experiment that investigated the extent of job discrimination faced by people of different ethnic backgrounds found that whites had a 3-to-1 advantage over blacks in job offers.
SOURCE: © iStockphoto.com/DWlabs Inc.

SURVEY RESEARCH

The social survey is a key social science tool for gathering evidence. Survey-based knowledge is used to estimate Canadian unemployment and to calculate our rate of inflation (as measured by the Consumer Price Index). For sociologists, surveys are the main method used in collecting evidence. By asking a large, representative sample of people identical questions, survey research provides a method of systematically comparing answers. It also allows researchers to generalize the results to the larger population from which the sample was randomly chosen. Questions can be posed either on a **self-administered questionnaire** or through an **interview**. Increasingly, the Internet is used to conduct surveys (Brym and Lenton, 2001).

Marjan Houshmand and her colleagues (Houshmand, Seidel, and Ma, 2014) used a survey to investigate the following research question: Does working for pay as a teenager have positive, neutral, or negative consequences for future occupational outcomes? You can imagine personal benefits stemming

from paid employment, including more spending money, job experience, and skill development. But the jobs available to young workers are often part-time, boring, and low-paid.

For someone who is 15 years old, how do you weigh the costs and benefits of working for pay? Houshmand and her team chose to do this by examining "future occupational outcomes," which they measured in several different ways, including the likelihood of finding a job after finishing all schooling and the amount of income they received. Do these latter items provide good indicators of the Houshmand team's idea of future occupational outcomes? That is, are these valid indicators? **Validity** refers to accuracy or relevancy. Houshmand and her team chose to use several different indicators to help ensure that they were really tapping into occupational outcomes.

A related measurement issue is reliability. Whereas *validity* relates to the link between a concept (e.g., occupational outcomes) and measures of that concept (e.g., income), **reliability** refers to the consistency with which something can be measured. Your grade point average measures a theoretical concept, intelligence, or knowledge. If your grades across several courses in a particular subject area are fairly consistent, then these marks are taken as a reliable measure of your subject knowledge. A **measurement** is reliable if it is consistent or repeatable. As we will see in a moment, the Houshmand team used grade point averages as one of their measures, a measure they were fairly confident had both good reliability and validity.

The next problem that Houshmand and her colleagues faced was designing a research study that would allow them to know details about a person's employment at age 15 and their subsequent labour market outcomes. Their research question involved a claim about causality: What were the consequences of something happening at time one (employment at age 15) for something that happened later in life (future occupational outcomes)? They had to satisfy all of the claims about causality detailed earlier: association, temporality, nonspurious, and causal mechanism. They accomplished this using a Statistics Canada survey where people were interviewed multiple times, the *Youth in Transition Survey* (YITS).

As the study name implies, the researchers examined transitions. The YITS project first interviewed a sample of people in 2000 and then questioned them again every two years. Surveys always involve **sampling**. It would not have been practical for Houshmand's research team to interview all 15-year-olds in Canada (a complete enumeration of everyone would be a *census*). However, it is this larger population of 15-year-olds about which Houshmand wanted to draw conclusions. A *sample* is used to represent the attitudes and behaviours of everyone. We use rules of chance or probability to select individuals who are representative of the larger population.

For Houshmand's study, choosing a random sample of 15-year-olds was not easy. No listing of every 15-year-old exists. In drawing a sample, Statistics Canada chose to use a two-stage process. First, the researchers had a list of all high schools in Canada. They randomly selected 1200 schools from each of the ten provinces. Second, from each of these schools, they selected a random sample of 15-year-olds.

How many students should Statistics Canada have selected? The precise answer depends mainly on the amount of variation or heterogeneity in the population and the degree of accuracy required in the study's conclusions. If you need very accurate results, you need a larger sample. Likewise, if the population is very variable, you need a larger sample to reflect that heterogeneity adequately (thankfully, our blood is quite homogeneous and so only one jab is necessary to obtain a blood sample).

Ethical issues are also a concern. Two key principals of **ethics** can be illustrated by the YITS study. First, participation had to be voluntary. It would have been inappropriate to have coerced involvement. Second, people had to have volunteered based on informed consent. That is, they, and in this case their parents, too, had to have been informed about the nature of the study, the types of questions, the commitment of time, and especially, the ongoing nature of their participation.

Houshmand and her colleagues wanted to know whether working at age 15 had any causal effects on future occupational outcomes. What she and her team found was that having a paid job at age 15 meant you were more likely to earn higher incomes in jobs, if you were working, in each of the next four interview cycles. And they found you were more likely to be working for pay in each of the subsequent cycles.

But remember that much earlier, I mentioned skepticism. For example, could some other factor be accounting for these findings? Could the results be spurious? Could school grades be complicating these outcomes? It is conceivable that students who were employed at age 15 also had higher grades, and these higher grades might be causing their better

Researchers collect information through surveys by asking people in a representative sample a set of identical questions. People interviewed on a downtown street corner do not constitute a representative sample of a country's adults because the sample underrepresents people who live outside the urban core, underestimates the number of seniors and people with disabilities, does not take into account regional diversity, and so on.

SOURCE: © Janine Wiedel Photolibrary/Alamy.

occupational outcomes. It turns out that people employed at age 15 did have higher GPAs than those not employed (a non-obvious finding). However, by statistically controlling for GPAs—that is, by comparing students with the same GPA— Houshmand and her team ruled out GPAs as a potentially spurious causal factor explaining the results.

At the heart of a survey are the questions asked of respondents. In asking people questions, either in interviews, on questionnaires, or by other methods of research discussed below, we must be careful about making assumptions (Guppy and Gray, 2008):

- *Do not assume that people understand what you are asking.* Language is notoriously ambiguous. How many friends did you see yesterday? This question may look simple, but people will differ in their understanding of "friends."
- *Do not assume that people know the answer to questions.* Most people do not want to appear ignorant, so they may provide an answer even if it is just a guess.
- *Do not assume that people will admit the answer, even to themselves.* Alcoholics frequently claim that they can "quit any time." People routinely deceive themselves, sometimes only in minor ways, but admitting the truth, even to ourselves, is sometimes a problem.
- *Do not assume that people will give valid answers.* People feel better about themselves when they are seen in a favourable light. In asking questions of people, researchers face the potential problem of "social desirability" because respondents may give only answers that reflect well on them.

Survey researchers do not focus only on individuals, although it is individuals who respond to survey questions. For example, it is possible to survey organizations, groups, corporations, electoral ridings, or job vacancies. In other words, the questions

people answer may apply to a unit or group about which someone is knowledgeable. I am making two points here. First, surveys can focus on different units of observation (individuals, businesses, workplaces, and so on). Second, individuals can act as informants to report answers pertaining to some group or unit about which they have information.

QUALITATIVE RESEARCH

Houshmand and her team used survey methods to obtain generalizable knowledge about how working as a teenager might influence later-life employment. To generate patterns that summarized the experiences of thousands of people, they relied on many respondents questioned many times over several years. In contrast to creating generalizable, summary findings, a qualitative researcher might have examined a far smaller number of respondents but sought a richer and deeper understanding of how young people understood their situation.

Jade Boyd (2014) did the latter in her study of the social class anxieties of young people from East Vancouver. East Vancouver is a working-class neighbourhood, and the young people she studied worked hard to differentiate themselves from the mainstream nightlife practices of upscale youth from more affluent west-side neighbourhoods. Her "eastsiders" actively resisted the aggressive heterosexuality of the downtown nightclub scene, characterized by these youth as "hypermasculine, violently heteronormative, and dominated by an aggressive pick-up scene" (Boyd: 11). Her work is especially lucid in showing how the social "performance" of "East Vanners" acted in complex ways to displace, erase, and reconfigure social class and social hierarchy. She takes readers inside a subculture and vividly relates how people work to make both their material and social surroundings meaningful.

How was Boyd able to do this? She relied on two principal methods. First, she spent 24 months as a participant observer, visiting an array of sites and attending a variety of events where her East Vanners congregated. During this stage of her research, she took extensive field notes about a host of topics, including emblems of East Van pride, musical tastes and dance routines, and the use of spaces and places for an alternative party culture. Second, she relied on "open-ended in-depth interviews" with 25 East Vanners. Rather than asking everyone identical questions, as a survey researcher would, she allowed her respondents the freedom to express ideas and insights in an unconstrained manner, resulting in the unstructured nature of her "open-ended" interviews.

More generally, Boyd's fieldwork is referred to as *ethnography*. Ethnographers study people in their own environment or their natural setting. Although **ethnography** includes the researcher being immersed in a group or a subculture, it also typically involves a cluster of methods, including participant observation, in-depth interviewing, and the analysis of documents. Speaking with key informants who are central to the group or the subculture is crucial.

Boyd (2014: 4) showed how her participants "create and define for themselves what it means to be from East Vancouver . . . and to reveal a sense of pride in a stigmatized area of the city." In the language of C. W. Mills, to whom you were introduced in Chapter 1, East Vanners, who ostensibly have less personal mastery over their life chances than people from more affluent neighbourhoods, turn their private troubles into subcultural enclaves that provide a positive sense of pride and performance as ways to affirm their identity in the face of hardship.

In qualitative studies like Boyd's, examining the intentionality of social action is especially important. Max Weber (1949 [1904]) was one of the first sociologists to address the issue of intention as a focus of social research. Weber argued that in interacting with other people, we draw on meanings. For example, the clothing we choose to wear speaks to others. We attribute meaning to bow ties, jack boots, hoodies, and silk scarves. None of this is done naively, because what we wear helps define who we are. Skateboarders, for example, dress in a particular style; they wear a uniform of sorts. Making social life intelligible is part of what Weber thought sociologists must address. To understand skateboarding, it is essential to see how skateboarders "define the situation." It is important to learn about their culture and to understand their systems of meaning. The aim of such research is not to explain the behaviour of skateboarders from an outside point of view, but to investigate their shared values and beliefs—their "worldview" (see Kelly, Pomerantz, and Currie, 2005).

Weber maintained that causal logic can be used to accomplish some of what sociologists want to explain. He thought, however, that sociology also had to make intelligible the subjective basis of social action. Weber used the German word *Verstehen*, or understanding, to refer to this mode of sociological analysis. To understand the meaning of social action requires being

able, at least in principle, to fully engage in the social activity.

Let's pause to examine in more detail how Boyd sought to accomplish this in her study of youth in East Vancouver. Recall that she used two methods, **participant observation** and in-depth interviews. As a participant observer, Boyd involved herself in the daily lives of her East Vancouver participants. She visited group hangouts at 21 different sites, including "a range of formal and informal . . . down-market venues and pubs, makeshift art galleries, warehouse spaces, house parties, and public spaces such as alleys."

For two years, she observed the East Vanner subculture by participating in it, by being a part of the action. As a participant observer, she was able to ask many questions of different group members, gradually drawing a sociological portrait of the East Vancouver scene. In particular, she was able to contrast various interpretations: Was the subculture focused mainly on resistance, pleasure-seeking, or escapism? As her work progressed, Boyd was able to refine her understanding. She could cross-reference her observations by seeing how other group members reacted to each new insight she gained, thereby increasing both the reliability and the validity of her conclusions. In short, she came to "define the situation" as East Van participants themselves defined it.

However, Boyd did more than just participate. She also interviewed 25 East Vanners. As noted earlier, she used "open-ended, in-depth interviews" (Boyd, 2014: 5). An in-depth interview means that she explored specific topics in great detail, often pursuing nuances and tangents. She allowed respondents to range widely in their replies. These were loosely structured interviews in that she had a set of general issues she wanted to discuss, but she did not ask every person exactly the same questions in exactly the same order. Her goal was to have a meaningful conversation with each person, guided by her interest in the subject but also by that person's knowledge, willingness, and interest in pursuing specific themes.

An obvious strength of participant observation is that sociologists can see what people actually do, as opposed to relying on reports of what people say they do, as survey researchers must. Combining observation with semi-structured interviews also allows researchers to hear in respondents' own words their understanding of situations, their explanations for specific themes and interpretations.

As with experiments, the external validity of ethnography can be problematic. How confident can Boyd be that her conclusions are not dependent on the impressions she formed from a single subculture? The intensive, in-depth nature of qualitative research makes generalizability problematic. The key tradeoff is between the richly textured, "thick description" of ethnography and the insularity of detailed study of one or a few settings. Unlike survey researchers, ethnographers do not select different sets of random individuals or groups. The groups or settings they investigate are purposively chosen, sometimes because of easy access. For example, Boyd (2014) did not randomly choose East Van subcultures; she made arrangements to participate in the lives of some East Vancouver youth, and even then, it was only one form of youth subculture. Imagine also the ethical issues Boyd confronted.

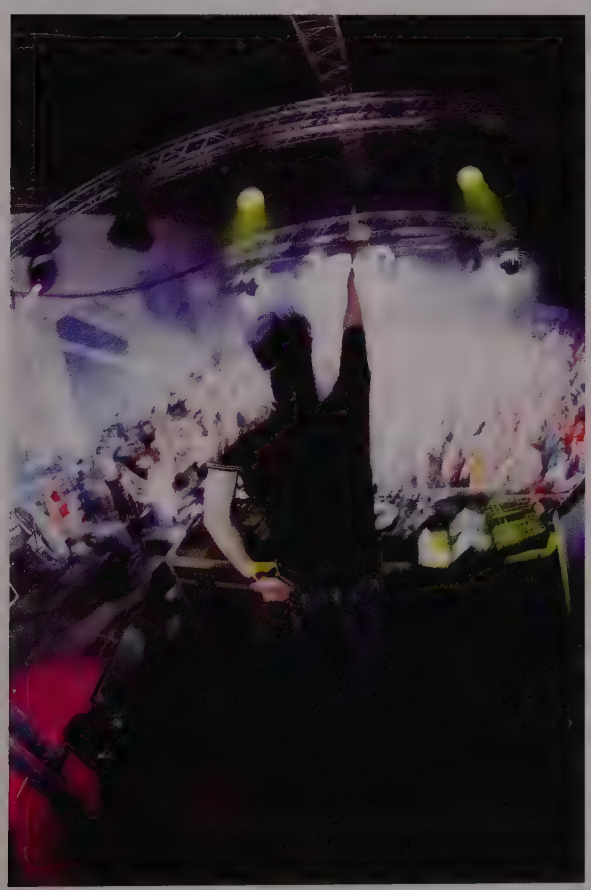
Boyd's research portrays a subculture from its members' points of view. There are potential pitfalls of which Boyd had to be aware. First, how much did her presence influence her findings? Did people act differently when she was not around? (Recall the earlier discussion of the Hawthorne effect.) In principle, there is no way to answer these questions, although ethnographers have tried to account for the effect of their presence in various ways. Some researchers conceal their research role; in effect, they try to be known to the other participants as one of them, rather than as a researcher (the ethics of this are dicey). Other researchers report that, with time, participants' awareness of their presence fades and they are treated as a member, as Boyd (2014: 7) reports.

Beyond the potential pitfall of mere presence is the second problem: the findings of researchers may be ethnocentric. That is, researchers may impose their own values—their own worldviews—on the subject matter of their study. How do we know, for example, that Boyd depicted East Vanners' point of view and not her own? One method of reducing personal bias is known as the "member test of validity" (Douglas, 1970: 21). For example, if the subculture participants Boyd spoke with did not recognize themselves in her account—that is, if they saw Boyd's account as inauthentic—we would worry about bias or distortion. Boyd was careful to "test" her tentative observations and insights on her informants by asking them questions and checking for observations that would falsify her impressions. Again, this is a research problem that extends well beyond ethnography. In fact, ethnography can be seen as the method that takes most seriously the task of understanding the members of a group from the members' point of view, stressing in particular their definition of the situation.

A third problem beyond presence and ethnocentrism is this: How do researchers know that the "tools" of their inquiry (e.g., questions, instructions, requests) did not in fact "create" or "generate" the resulting "findings"? For example, did Boyd create a finding by focusing attention on the East Vanners' resistance to dominant culture? This question involves issues of reliability and validity. Boyd distinguished between (1) East Vanners' comments made in response to her questions and (2) statements her informants volunteered or that she overheard during her fieldwork. These alternative sources of information helped her avoid the problem of "creating" meaning. If East Vanners volunteered information that corroborated Boyd's impressions, without prompts, her faith in the authenticity of her account increased.

Not all qualitative research involves participation. Rik Scarce (2000) was interested in the human domination of nature. His interest was in whether we could still speak of "wild salmon" or whether, like the cow and the dog, salmon were now domesticated. He argued that the very concept of "resource management" speaks to the idea of humans improving on nature, of scientists enhancing nature.

In studying the "domestication of salmon," Scarce used ethnographic methods. He was especially interested in how salmon had been manipulated to serve human ends. In the modern fishery, such phrases as *fish farming*, *aquaculture*, *genetic engineering*, *fish stocking*, and *fish hatcheries* are commonplace. Scarce learned about the modern fishery by hanging around fish hatcheries and asking questions, by visiting fishery research centres and watching what scientists were doing in their experiments, and by talking with scientists at their conventions and at public inquiries. He came to see the fish hatchery as a biological factory and to understand how salmon were increasingly "tooled" and "engineered." Observation was his staple method. His resulting work was an ethnographic account called *Fishy Business: Salmon, Biology, and the Social Construction of Nature* (2000).



In participant observation, it is often necessary to "look" the part. Sociologist Brian Wilson participated in rave parties to study firsthand the rave subculture of Southern Ontario.

SOURCE: © Alexandru/Shutterstock.

COMPARING QUALITATIVE AND QUANTITATIVE APPROACHES

Sociology is a knowledge-seeking discipline. Evidence to support or refute theoretical knowledge claims is central. In its broadest forms, evidence is typically collected using either qualitative or quantitative methods. Each approach has strengths and weaknesses. In Table 2.1, I summarize these by pointing out what the two approaches share and then highlighting their principal differences. It is impossible, in a summary table, to fully capture all of the issues others have written books about (Ragin and Amoroso, 2011). But by reading the table carefully and reflecting on the examples outlined above, you should come to appreciate the similarities and differences in the two approaches.

The fundamental difference between the two approaches is *not* that one uses numbers and the other does not. The main difference is in how evidence is used to explain social processes. Quantitative approaches are reductionist in that they boil down large amounts of data into summary numbers that underpin conclusions. Qualitative scholars, in contrast, focus on the interpretation of meanings, essentially trying to understand people's behaviour in social context. Qualitative and quantitative approaches are central to the repertoire of methodological tools used to gather evidence in sociology. Most newly trained

TABLE 2.1 Commonalities and Differences between Qualitative and Quantitative Methods

COMMON ATTRIBUTES/ISSUES	QUALITATIVE AND QUANTITATIVE METHODS	
	Both methods expand or deepen our knowledge of the social world. Validity and reliability checks are central in both methods. Veracity of evidence is cross-checked in multiple ways. In both methods, data are used to develop or test theory. Ethically informed consent and the elimination of harm are imperative.	
DIFFERING ATTRIBUTES/ISSUES	**QUALITATIVE METHODS**	**QUANTITATIVE METHODS**
Primary focus	Social action and person-to-person interaction	Identifying and summarizing general social patterns
Purpose	Understanding context and interpreting people's points of view and the meanings they attach to different social situations	Understanding causal relationships; stress on explanation and prediction
Cases selected	Few; purposeful selection	Many; random and representative selection
Evidence collection	Detailed, in-depth; based on prolonged and persistent observation; involves journal writing	Formal, standardized; based on one or more detailed episodes of standardized questioning
Position of researcher	Immersed in, or close to, the social action/interaction	Distant; relies on respondents answering pre-scripted questions
Evidence presented	Quotations, observations, themes, nuanced interpretations	Numerical, statistical; involves tables, graphs, visual displays
Examples of methods	Ethnography, participant observation, in-depth interviews	Surveys, analysis of administrative records, experiments

sociologists are skilled at both approaches and an increasing number of research projects involve both approaches.

OTHER METHODS OF RESEARCH

Historical Sociology

Many sociologists study social change. Max Weber, for example, attempted to explain the rise of capitalism by showing how Protestantism invigorated capitalist growth. Émile Durkheim was interested in how moral education helped to socially integrate a rapidly changing society. Both writers sought to answer sociological questions by examining historical change as evidence of significant social processes. Sociologists are more likely than historians are to use historical evidence to test theories of social change, placing less emphasis on history for history's sake.

Liliana Riga's (2008) work shows how sociologists make effective use of historical methods (see also Brym, 1978). Riga reexamined the nature of revolutionary Bolshevism among the leadership of the 1917–23 Russian Revolution. She wanted to understand the roots of the socialist ethic that inspired the revolution. This critical juncture in world history has often been contextualized within a framework stressing the class basis and Russian ethnicity of the revolutionary leadership. In contrast, Riga argued that, in large measure, it was social inequalities made most visible by diverse ethnicities, and not so much by social class, that lay behind the radical mobilization. She arrived at this conclusion after systematically comparing the experiences of class and ethnicity among the revolutionary elite leaders.

Of course, these leaders have long since died, so Riga could not question or observe them. What she could do, however, was reconstruct their life histories. She used autobiographies, biographies, and memoirs, supplemented by police arrest records where ethnic backgrounds were often noted. She used sources

predominantly constructed before the late 1920s. This latter refinement was essential when you recall that revolutionary leaders first had to mask their true identities in Tsarist Russia but even more importantly had to maintain social identities consistent with the *Soviet* revolutionary movement (especially problematic in the Stalinist era from 1922 to 1953).

The logic of Riga's analysis is not unlike that of other sociological research. Her key dependent variable is the revolutionary identity and politics of the Bolshevik elite. She wanted to know how important social class, ethnicity, and their intersection were to the formation of this radical group. She therefore needed to measure social class and did so by examining such indicators as landholding, occupation, education, and relations to capital of individual members of the elite (and their parents). To measure ethnicity, she used a mixture of birthplace, religion, and nationality. She concluded by noting that "ethnocultural identities were often more salient dimensions to many of their social experiences—and therefore to identities and politics—than was class."

Documentary Analysis

Sociologists have also made useful contributions to knowledge through the examination of official documents. Renisa Mawani (2003) examined archival documents, including colonial maps, to demonstrate a social process whereby geographical spaces were rendered "vacant" and therefore accessible to settlement and development. By showing how Indigenous land-use was made to vanish at some points, only to have later colonial authorities redraw the maps to show their own presence, Mawani demonstrated the contested nature of landscape, both then and now.

Mawani also drew on legal documents, such as cases and statutes, to understand how the rule of law was used to displace Indigenous peoples and, again reflecting contestation, how it was later used by Indigenous peoples in resistance. As a third methodological strategy, she examined the ways in which an Indigenous presence has been commemorated (e.g., via totem poles). By a careful comparison of the evidence offered through these documented sources, she showed how a civic identity has shifted from a settler society to a postcolonial, multicultural city. Notice that her work is also historical.

Content Analysis

Baumann and Ho (2014) studied Canadian television food advertisements to examine the relationship between race and food. They used both quantitative and qualitative approaches in their investigation. In observing 244 commercials featured on the CBC, CTV, and Global television channels, they first counted how whites, blacks, and Southeast Asians were portrayed with different food categories. One of their main findings was that whites were strongly associated with whole foods, while both blacks and Southeast Asians were linked with fast food.

In the qualitative phase of their work, they conducted a "reading of the character roles" in the advertisements to understand what qualities of the racial groups tend to be emphasized or downplayed (Baumann and Ho, 2014: 160). They found, for example, in comparison to the other racial groups, whites were often portrayed as crafting quality food products. An Oka cheese commercial stressed the historical experience of quality cheese production. In contrast, although Asians appear much less frequently than whites in commercials, they are often portrayed in ways that stress a lack of emotion and high achievement aspirations. The quantitative assessment captures numerical counts of each group across different food categories while the qualitative examination provides a richer, more nuanced sense of how these associations are developed in advertisements.

Use of Official Statistics

Governments have a long history of collecting statistical data (see the Critical Sociology: Governments and Big Data feature). Governments first collected statistics to help rulers determine both the size of their taxation base and the number of men they could put on the battlefield. Since then, the scope of government or official statistics has expanded and now includes information on births and deaths, unemployment rates, imports and exports, and so on.

Wortley and Tanner (2003) used official arrest records from Toronto to examine the extent of racial profiling in patterns of search and arrest practices. Detecting racial profiling requires determining that law enforcement officers use race as a significant factor in their decisions. That might sound easy, but it is incredibly complex because higher search or arrest rates among certain groups might be due to reasonable assumptions based on existing crime patterns, surveillance, or neighbourhood requests for greater police presence. Ruling out these latter factors and other possible explanations for racial differentials in police decision making must occur before conclusions about racial bias in decision making can be claimed.

Critical Sociology GOVERNMENTS AND BIG DATA

Big Data is a big deal. You can think of Big Data as the repeated tsunami of digital information generated daily by phones, credit cards, the Web, and the Internet of things (Internet-connected devices in buildings, appliances, vehicles, and so on). Not only do we generate and capture an almost unimaginable number of bytes of data daily, but increasingly with machine learning and artificial intelligence, we are able to analyze, or mine, this massive data array.

Big Data analytics are an even bigger deal. For example, domestic political parties and foreign governments analyzed Big Data to identify and influence the opinions of voters in the United Kingdom's Brexit referendum and the 2016 American presidential election (Brym et al., 2018). Since then, democratic countries have become more vigilant in trying to protect the electoral process. Nonetheless, it is not always clear who is capturing our digital data and what they are using it for.

States have long had an interest in counting citizens; the first Canadian census dates from 1666 and, over the years, censuses have helped governments decide everything from where to build new roads to how many doctors to train (Brym 2014). However, Statistics Canada, the federal agency responsible for the census, would now like to supplement its data collection efforts by capturing electronic records of Canadians' credit details and banking transactions (Statistics Canada, 2018). Statistics Canada officials argue that new data collection methods that tap into how we live (including how we live online) are essential to providing more accurate and more useful information. Especially because survey response rates have been declining and analysts worry about the accuracy of self-report data, there are good reasons to see potential benefits for Canadians in this new use of Big Data.

Some Canadians are spooked by Statistics Canada's proposal, perhaps not remembering that the government already has an abundance of information on us, including tax files, passport applications, border crossings, municipal property records, court filings, and so on. Still, concerns about ethics and privacy need to be taken seriously. After all, data breaches of rich personal information covering the entire Canadian population could easily be catastrophic.

Critical Thinking Questions

1. Businesses like Amazon, Apple, and the Royal Bank of Canada track consumers and their spending habits. Should Statistics Canada be able to do the same, and if so, what safeguards might need to be in place?
2. Governments asking questions of, and capturing data on, citizens can be seen as invasions of privacy. However, governments are expected to serve the interests of the people. How can one balance the invasion of privacy with the promotion of the common good as it relates to government efforts to understand details about how society works?

Wortley and Tanner were following up on an investigative report published in the *Toronto Star* in October 2002. The *Star* alleged that racial profiling occurred in Toronto, an accusation that police officials disputed. Wortley and Tanner cautiously claimed that their analyses of both official statistics and survey research were consistent with the practice of racial profiling by law enforcement officers (Wortley and Tanner, 2003, 2005).

The racial profiling example illustrates a central problem with official statistics. These statistics are not objective facts on which everyone agrees. The very definition of racial profiling makes it difficult to prove. Furthermore, different interest groups have much at stake over whether such practices occur (Gabor, 2004). The police are charged with the difficult task of upholding the law fairly and without prejudice. Certain groups may request more police presence than do other groups and so what might appear to be racial profiling might actually reflect community requests. Official statistics require interpretation and such interpretation can be complex.

TIME FOR REVIEW

1. Using Table 2.1 as a template, compare and contrast the research studies by Jade Boyd (East Vanners) and Marjan Houshmand and her colleagues (teenage jobs), specifying the strengths and weaknesses of each study.
2. What are the most distinctive attributes of qualitative versus quantitative research methods?
3. Identify a research project you would like to conduct. Which of the methods identified above is best suited to your project?

THE ANALYSIS OF NUMERICAL DATA

Sociological evidence frequently comes in numerical form—that is, as quantifiable evidence (e.g., incomes, unemployment rates, or ethnic group membership). Finding and interpreting patterns in numerical data is a complex process, so in this section I briefly illustrate some of the key aspects. I explore the following research questions, mentioned earlier: Does family background, especially parental education, influence the likelihood of someone graduating from university? Since success is often influenced by gender, does this parental effect hold equally for women and men?

Note the causal logic here. Family background is hypothesized to affect access to university. However, since gender is known to affect educational success, maybe the causal link between family background and university success differs by sex.

To begin, we need to examine the link between family background and university success. I do this using data from the *General Social Survey* for 2014 (Statistics Canada, 2016), a nationally representative sample of Canadians. Does family background affect university success? In other words, I want to know if not having a parent with a university degree lessens your likelihood of gaining a university degree, and if so, by how much. To make the answer as relevant as possible, I consider only people between the ages of 25 and 34 in 2014, the survey year.

Table 2.2, called a *contingency table* or a *cross-tabulation*, gives an answer. I measured family background, the independent variable, by asking whether either parent of a survey respondent had attained a university degree. This variable, displayed across the top of the table, has two categories (low: neither parent has a university degree; and high: at least one parent has a university degree). As an indicator of university success, I ask whether the respondent was a university graduate or not. This variable, the dependent variable, has two categories (yes: has a university degree; and no: does not have a university degree). And because I am also interested in whether the pattern differs by gender, I construct separate tables for women and men.

Notice first the table's arrangement. The title describes the two variables being related. The independent variable (parental education) is placed at the top of the table with the values clearly delineated. The dependent variable (degree recipient or not) is arrayed on the side of the table, again with the value labels clearly shown. Beside each value of the dependent variable is a row of numbers. To illustrate, Table 2.2 shows that, for women, there are 424 people in the top left cell, the cell defined by a low level of parental education and the receipt of a university degree. At the intersection of each column and row is a table cell (there are four cells for each gender in Table 2.2 because row and column totals are ignored in counting the number of cells in a table).

The concept of a contingency table comes from the idea that the category into which a person falls on the dependent variable may be contingent on, or depend on, the category that a person occupies on the independent variable. If the hypothesis were true in this case, we would expect that, as we move from

TABLE 2.2 The Relationship between Parental Education and the Likelihood of Attaining a University Degree, by Gender

	FOR WOMEN PARENTAL EDUCATION			FOR MEN PARENTAL EDUCATION		
HAS A UNIVERSITY DEGREE	**LOW**	**HIGH**	**ROW TOTALS**	**LOW**	**HIGH**	**ROW TOTALS**
Yes	37% (424)	65% (406)	47% (830)	24% (224)	56% (333)	36% (557)
No	63% (721)	35% (220)	53% (941)	76% (720)	44% (266)	64% (986)
Column totals	100% (1145)	100% (626)	100% (1771)	100% (944)	100% (599)	100% (1543)

SOURCES: Data are adapted from Statistics Canada (2016); calculations by author.

parents with lower education to parents with higher education, the number of people receiving university degrees ought to rise. Do the data reveal this pattern? For young women whose parents did not attend university, 424 received a degree. For those with at least one parent who had a university degree, 406 obtained a degree themselves. These figures seem at first glance not to support our expectation. Notice, however, that because of how parental education was categorized, 1145 graduates had parents whose education I defined as low, while only 626 had what I defined as high education. Comparing the actual number of people in each cell is therefore misleading, because there are different numbers of people in each column.

Rather than focusing on the raw numbers, a better understanding of the patterns comes when we standardize the data. We need to ask what *percentage* of people in each parental education category received university degrees. By expressing the numbers as percentages—that is, by standardizing the data—it is much easier to see the patterns. So, 424 of 1145 young people in the low parent education column received a university degree, or 37 percent (424 divided by 1145 and then multiplied by 100). This tells us that for every 100 people whose parents did not have a university degree, 37 earned a degree by graduating from university. Making the same calculation for the high parent education column—(406/626) × 100—we find that 65 percent received a degree (or 64 of every 100 people).

If you examine Table 2.2, you will see that the percentages are entered in the table. The actual number of people in each cell appears in parentheses. Notice that the percentages are calculated separately for each column, summing to 100 percent at the bottom of each column.

So, do relatively more young women whose parents had high education receive degrees themselves in comparison with others whose parents had less education? Yes. Of every 100 people in the high parent education column, 65 received a university degree (65 percent), compared with only 37 of every 100 in the low parent education column (37 percent). The difference between these two percentages (28 percent) is one measure of the strength of the relationship between parental education and gaining a university degree: The higher the education of her parents, the more likely a woman is to receive a university degree.

In studying this table, some readers may have taken exception to my definitions of high and low parental education. Why should the lack of a university degree be considered lower education? What I defined as low and high education is arbitrary. However, when I define the lows and highs of parental education differently (e.g., high school graduate or not) and produce tables based on this new definition, the basic patterns do not change. This replication gives me confidence that my decisions about how to categorize parental education do not affect the results.

The evidence in Table 2.2 demonstrates that, for women, parent's education influences the likelihood of attaining a university degree. But how about men? In Table 2.2, 24 percent of men whose parents did not have a university degree received a university degree themselves, whereas 56 percent of men whose parents had a high education received a degree. The difference between these two cell percentages is 32 percent.

For men, although the pattern is similar, the percentage difference is slightly larger (and therefore the relationship between parental education and degree attainment is slightly stronger). Contrasting the percentage differences between the women and the men, Table 2.2 gives us a way of comparing the strength of the link between parental education and university attainment for young women versus young men.

So what do we learn from this analysis? We learn from Table 2.2 that a parent's education influences the educational achievement of offspring. Second, by comparing the two sets of results, we learn that this link is perhaps a bit stronger for men than for women, although the difference is modest. The relatively large sample size of 3314 and the random selection of survey participants give us confidence that these differences are not due to chance.

Notice one last thing about this analysis. Some respondents in the initial 2014 survey did not answer the question about their parent's education (perhaps they were unsure), and a few people did not answer the question about their own education. I had to exclude these respondents from the analysis. This is one of the many reasons that all research findings are provisional until we gather a large body of evidence that replicates the basic patterns or fails to do so, preferably using both quantitative and qualitative methodology.

TIME FOR REVIEW

1. Reflecting on the relationship between parental education and receipt (or not) of a university degree, are the four conditions of causality identified earlier in the chapter satisfied?

2. Why are percentages calculated down the columns as opposed to across the rows in order to answer the question of whether parental education influences the likelihood of scholarship receipt?

THE FUTURE OF SOCIAL RESEARCH

Social research involves systematically studying the social world. The aim of such research activity is to develop explanations and understandings of social patterns beneficial to improving the human condition. Today, it is becoming increasingly obvious that we need to find innovative ways of organizing and running human affairs. Starvation, environmental degradation, terrorism, and social injustice are among the many social problems we must confront. Solutions require adequate explanations for, and understandings of, how these problems arise and persist.

Several sources of knowledge exist. They include common sense, religious faith, and science. Although these forms of knowledge share certain features (e.g., they are all imperfect), scientific reason encourages a set of practices—open review and critical skepticism—that work together to reduce error.

Another way of emphasizing what is distinctive about the scientific method is to compare how social research differs from the work of other professionals who concentrate on similar social issues. For example, what differentiates the work of documentary filmmakers, novelists, or journalists from that of social researchers? I have emphasized three features of scientific research that, in combination, separate it from the work of these other professionals:

1. Prior to publication, research results are subjected to the critical skepticism of other scientists.
2. Social theory guides, either directly or indirectly, the evidence gathered.
3. Evidence is systematically collected and analyzed.

Although some of these features are found in the work of other professionals, such as journalists, all three features are found in good social research. Replication and reproducibility have high currency in science as ways of encouraging skepticism. Good research contributes new ideas or evidence to our common stock of social theory. Finally, good research publicly displays the careful, ethical collection and analysis of evidence.

These principles are a feature of all good research, but the methods that sociologists use to pursue their goal of explaining and understanding the social world take many forms. This diverse array of methods, including observing, questioning, and experimenting, offers sociologists many ways of inquiring responsibly and ethically about the social world. Each method has different strengths and weaknesses, which makes the choice of research strategy dependent on the sociological question being asked. Effective policy solutions that benefit all people require sound social research.

SUMMARY

1. **What is the point of research methods?** Basing decisions on the best available knowledge has been important to making the world more equitable and freer from coercion and deceit. Research methods are ways of gathering evidence to test suppositions about the world and how to make it a better place.

2. **What is scientific knowledge?** Science is one of many ways of knowing. Scientific knowledge incorporates explicit methods designed to reduce error in what is currently accepted as scientific knowledge. Evidence must be systematically and ethically collected and rigorously and publicly evaluated.

3. **What are the hallmarks of good social science?** Good science integrates useful theory and robust research. Theories are ideas about how the world works or claims about how to explain or understand the recurring, patterned nature of human activity. Research allows social scientists to test the validity of theories.

4. **How do we judge the quality of a theory?** Evidence is crucial to developing, revising, or discarding theoretical claims. In comparison with the evidence available in the natural sciences, the evidence available to social scientists presents added complexity because of the meaningful character of human social action. People,

unlike molecules, assign meaning to their actions and to the actions of others.

5. **What are the main research methods?** Sociologists have devised many useful methods for obtaining evidence about the social world. Qualitative and quantitative approaches are the two principal techniques. Qualitative methods include ethnographic research and participant observation. Quantitative methods include surveys and experiments.

QUESTIONS TO CONSIDER

1. The teaching effectiveness of faculty members in university and college departments could be evaluated in various ways. Suggest different sociological methods of doing such an evaluation and comment on the strengths and weaknesses of each approach.
2. Houshmand (2014) and her team used longitudinal survey evidence to evaluate whether having jobs as teenagers influences post-schooling occupational careers. Suggest alternative designs for her study, commenting on the strengths and weaknesses of the various approaches, including important ethical considerations.
3. Policymakers frequently debate raising or lowering age restrictions on activities, such as driving a car, drinking alcoholic beverages, or voting. Suggest how you might design a study that could provide evidence about the possible consequences of either raising or lowering one of these age restrictions.
4. Ethical issues have been discussed alongside each of the various methods. Create a chart or a table that compares and contrasts the ethical dilemmas that are most prevalent in each type of research methodology. Are most dilemmas common to all methods or do they tend to vary by type of methodology chosen?

GLOSSARY

A **causal relationship** (p. 35) involves a relationship between two variables in which change or variation in one variable produces change or variation in a second variable. Four criteria are essential to establishing a causal relationship between two variables: association, time ordering or temporality, nonspuriousness, and the existence of social mechanisms that link cause and effect.

The **dependent variable** (p. 39) is a variable that is assumed to depend on or be caused by one or more other variables (independent variables); it is the variable that is the effect, or outcome, in a cause–effect relationship.

Ethics (p. 41) in research involves an individual's ability to understand what he or she is being asked to do in a research study, make a reasoned judgment about any effects research participation might have on that person, and make a choice to participate free from coercive influence. Informed consent is central to this decision-making process. Knowledge about the funder of a research project is important to informed consent.

Ethnography (p. 43) is the detailed description of a particular culture or way of life, or the written results of a participant-observation study.

Experiments (p. 38) are controlled tests of the causal effects of particular variables or sets of variables on dependent or outcome variables.

An **explanation** (p. 35) is an account of the causal logic that shows how and why variables influence one another.

External validity (p. 40) is the generalizability of a particular finding from the study group to a larger population; the relevance of conclusions for a larger population; or the ability to infer that the results of a study are representative of processes operating in a broader population.

In the **Hawthorne effect** (p. 40), people involved in a study may be influenced by the very process of being studied; the study has an impact on the behaviour of the subjects of the study.

A **hypothesis** (p. 39) is an unverified knowledge claim or hunch about how the world works; it is a testable statement, derived from a theory, about the relationship between two or more variables.

The **independent variable** (p. 39) is a variable that is presumed to affect or influence another variable; it is the causal variable.

An **interview** (p. 40) is a method of collecting information by asking people questions, either in person or over the telephone. Interviews range from highly structured (preset questions in a fixed order) to loosely structured (topic guidelines, but no prescribed question wording).

Meaningful action (p. 34) occurs with specific intentions or reasons in mind. The uncontrollable tic in a person's eye is physical behaviour, which differs from that of a person who is winking at someone, where intention or purpose is central to understanding what is happening. Most human activity is meaningful action, or social action.

A **measurement** (p. 41) is reliable if it is consistent or repeatable.

Objectivity (p. 33) is the quality of minimizing the effect of personal bias on research results or the idea of impartiality, of "fair hearings." Objectivity is an ideal enhanced by research being open to the critical scrutiny of others. Objectivity as complete impartiality is a myth.

Participant observation (p. 44) involves the participation of the researcher, to varying degrees, in the activities of the group under investigation; it attempts to give an "insider's" account of a particular way of life or cultural system.

Randomization (p. 39) is a procedure used in experiments to assign test subjects to experimental conditions on the basis of chance.

Reliability (p. 41) is the consistency of measurements and the ability to reproduce the same measurements on repeated occasions.

Sampling (p. 41) is the process of selecting units from a larger population. Random sampling involves the selection of representative units (e.g., people, organizations) from a population (e.g., all Canadians, voluntary organizations in a city). Samples can be selected by probability (where every unit has a non-zero chance of selection) or nonprobability (where chance does not enter into the selection of sample units).

Using a **self-administered questionnaire** (p. 40) is a method of collecting information by having people record their own answers to preset questions.

A **spurious relationship** (p. 35) involves an incorrect inference about the causal relationships between variables.

Understanding (p. 36) is the ability to provide a definition of a situation that members of a culture find authentic and valid.

Validity (p. 41) is the relevance or accuracy of a measurement in relation to the theoretical concept that it is supposed to measure.

Variables (p. 39) are things that vary or attributes or events that can take on more than one value (e.g., the unemployment rate, age, sex).

NOTE

1. Black swans, native to Australia, were unknown to Europeans before exploration. The idea that all swans are white is thus similar to the idea that Earth is the central body in the solar system—a claim once understood to be true but now thought to be false.

PART 2

CULTURE

Illustrated by Aaron Millard.

CHAPTER 3

CULTURE

Robert Brym UNIVERSITY OF TORONTO

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- See culture as a tool that improves the likelihood of human survival.
- Contrast biological explanations of human behaviour with sociological explanations that focus on culture.
- Appreciate differences among functionalist, symbolic interactionist, and conflict approaches to understanding culture.
- See how culture operates as a force that simultaneously increases human freedom and constrains social action.

CULTURE AS PROBLEM SOLVING

Most Toronto Maple Leafs go through the side entrance of the Scotiabank Arena to get to their dressing room. Not so Auston Matthews and Mitch Marner. The two good friends take a long route to the dressing room every home game. They apparently think that doing otherwise would bring them bad luck.

When they started this superstitious practice, they were taking a first step toward creating one aspect of culture, the socially transmitted ideas, practices, and material objects that people create to deal with real-life problems. Their superstition evidently helps to reassure them and thus lets them play better. Research shows that, in general, superstitious practices help athletes reduce anxiety and improve self-confidence and performance (Damisch, Stoberock, and Mussweiler, 2010).

Like soldiers going off to battle, university students about to write final exams, and other people in high-stress situations, athletes invent routines to help them stop worrying and focus on the job at hand. Some wear a lucky piece of jewellery or item of clothing. Others say special words or a quick prayer. Still others cross themselves. And then there are people who engage in more elaborate rituals. For example, sociologists Cheryl and Daniel Albas of the University of Manitoba interviewed 300 university students about their superstitious practices before final exams. One student felt she would do well only if she ate a sausage and two eggs sunny side up on the morning of each exam. The sausage had to be arranged vertically on the left side of her plate and the eggs placed to the right of the sausage so they formed the "100" percent she was aiming for (Albas and Albas, 1989). Of course, the ritual had more direct influence on her cholesterol level than on her grade. Indirectly, however, it may have had the desired effect. To the degree that it helped to relieve her anxiety and relax her, she may have done better on exams.

Mitch Marner and Auston Matthews
SOURCE: © Mark Blinch/Getty Images.

When some people say *culture*, they refer to opera, ballet, art, and fine literature. However, for sociologists, this definition is too narrow. Sociologists define **culture** broadly as all the socially transmitted ideas, practices, and material objects that people create to deal with real-life problems. For example, when Marner and Matthews developed their superstition and the university student invented the ritual of preparing for exams by eating a sausage and eggs arranged just so, they were beginning to create culture in the sociological sense. These practices helped the two hockey players and the student deal with the real-life problem of high anxiety. Similarly, tools help people solve the problem of how to plant crops and build houses. Religion helps people face the problem of death and how to give life meaning. Tools and religion are also elements of culture because they, too, help people solve real-life problems.

Note, however, that religion, technology, and many other elements of culture differ from the superstitions of athletes and undergraduates in one important aspect. Superstitions are often unique to the individuals who create them. In contrast, religion and technology are widely shared. They are passed from one generation to the next. How does cultural sharing take place? Through human interaction, communication, and learning. A **society** involves people interacting socially and sharing culture, usually in a defined geographical area.[1] Culture, then, may be defined as the sum of the socially transmitted ideas, practices, and material objects that enable people to adapt to, and thrive in, their environments.

TIME FOR REVIEW

1. How do sociologists define culture?
2. How is culture socially transmitted?

THE ORIGINS AND COMPONENTS OF CULTURE

You can appreciate the importance of culture for human survival by considering the predicament of early humans about 100 000 years ago. They lived in harsh natural environments. They had poor physical endowments, being slower runners and weaker fighters than many other animals. Yet, despite these disadvantages, they survived. More than that, they prospered and came to dominate nature. This feat

was possible largely because they were the smartest creatures around. Their sophisticated brains enabled them to create cultural survival kits of enormous complexity and flexibility. The cultural survival kits contained three main tools: abstraction, cooperation, and production. Each tool was a uniquely human talent. Each gave rise to a different element of culture.

ABSTRACTION: CREATING SYMBOLS

Human culture exists only because we can think abstractly. **Abstraction** is the capacity to create **symbols** or general ideas that carry particular meanings. Languages and mathematical notations are sets of symbols. They allow us to classify experience and generalize from it. For instance, we recognize that we can sit on many objects but that only some of those objects have four legs, a back, and space for one person. We distinguish the latter from other objects by giving them a name: chairs. By the time a baby reaches the end of her first year, she has heard that word repeatedly and understands that it refers to a certain class of objects.

True, a few chimpanzees have been taught to make some signs with their hands. In this way, they have learned some words and how to string together some simple phrases. However, even these extraordinarily intelligent animals cannot learn any rules of grammar, teach other chimps what they know, or advance much beyond the vocabulary of a human toddler (Pinker, 1994). Abstraction at anything beyond the most rudimentary level is a uniquely human capacity. The ability to abstract enables humans to learn and transmit knowledge in a way no other animal can.

COOPERATION: CREATING NORMS AND VALUES

The ability to cooperate is a second factor that enables human culture to exist. **Cooperation** involves creating a complex social life by establishing **norms** or generally accepted ways of doing things, and values or ideas about what is right and wrong, good and bad, beautiful and ugly. For example, family members cooperate to raise children. In the process, they develop and apply norms and values about which child-rearing practices are appropriate and desirable. Different times and places give rise to different norms and values. In our society, non-Indigenous parents might ground children for swearing, but in pioneer days, non-Indigenous parents would typically "beat the devil out of them." In contrast, Indigenous parents rarely physically disciplined their children. They preferred teasing and public embarrassment as means of social control, and they tended to get uncles and aunts to enforce discipline so as not to alienate their children (Muir and Bohr, 2014). "Never in anger" was the first rule of child discipline among the Inuit (Briggs, 1970). As these examples suggest, by analyzing how people cooperate and produce norms and values, we can learn much about what distinguishes one culture from another.

PRODUCTION: CREATING MATERIAL AND NONMATERIAL CULTURE

Finally, culture can exist because humans can engage in **production**; we can make and use tools and techniques that improve our ability to take what we want from nature. Sociologists call such tools and techniques **material culture.** All animals take from nature to subsist, and an ape may sometimes use a rock to break another object or use a stick to keep its balance in a fast-flowing stream. However, only humans are sufficiently intelligent and dexterous to *make* tools and use them to produce everything from shoes to computers. Understood in this sense, production is a uniquely human activity.

Table 3.1 illustrates each of the basic human capacities and their cultural offshoots in the field of

TABLE 3.1 The Building Blocks of Culture

THE HUMAN CAPACITY FOR . . .	ABSTRACTION	COOPERATION	PRODUCTION
Gives rise to these elements of culture	**Ideas**	**Norms and values**	**Material culture**
In medicine, for example,	*theories* are developed about how a certain drug might cure a disease	*experiments* are conducted to test whether the drug works as expected	*treatments* are developed on the basis of the experimental results

SOURCE: Adapted from Robert Bierstedt, *The Social Order* (New York: McGraw-Hill, 1963).

medicine. As in medicine, so in all fields of human endeavour: Abstraction, cooperation, and production give rise to specific kinds of ideas, norms, and elements of material culture.

Note that people usually receive rewards when they follow cultural guidelines and punishments when they do not. Taken together, these rewards and punishments, aimed at ensuring conformity, are known as **sanctions** or the system of **social control**. Rewards (or positive sanctions) include everything from praise and encouragement to money and power. Punishments (or negative sanctions) range from avoidance and contempt to arrest and physical violence.

Despite efforts to control people, we often reject elements of existing culture and create new elements of culture. Reasons for this phenomenon are discussed in Chapter 13, Deviance and Crime, and Chapter 15, Politics and Social Movements. Here it is enough to say that, just as social control is needed to ensure stable patterns of interaction, so resistance to social control is needed to ensure cultural innovation and social renewal. Stable but vibrant societies find a balance between social control and cultural innovation.

CULTURE AND BIOLOGY

The Evolution of Human Behaviour

We have seen how the human capacity for abstraction, cooperation, and production enables us to create culture and makes us distinctively human. This capacity is built on a solid biological foundation. Biology, as every sociologist recognizes, sets broad human limits and potentials, including the potential to create culture.

Some biologically trained students of human behaviour go a step further. For example, evolutionary psychologists claim that genes—chemical units that children inherit from parents—account not just for physical characteristics but also for specific behaviours and social practices (Mealey, 2010; Neuberg, Kenrick, and Schaller, 2010). They deny the significance of culture. Such thinking is growing in popularity, and it undermines the sociological perspective. As the following example illustrates, it is also misguided.

Male Promiscuity, Female Fidelity, and Other Myths

Evolutionary psychologists employ a three-step argument for their biological explanation of human behaviour and social arrangements. First, they identify a supposedly universal human behavioural trait. Next, they offer an explanation for why this behaviour increases survival chances through reproduction. Finally, they conclude that the behaviour in question cannot easily be changed. For example, they explain alleged male promiscuity and female fidelity as follows:

1. *Universal claim*: Men are more likely than women are to want many sexual partners.
2. *Survival-value argument*: Every time a man ejaculates, he produces hundreds of millions of sperm, while fertile women typically release only one egg per month. Based on these sex differences, men and women develop different strategies to increase the chances of reproducing their genes. Because a woman produces few eggs, she improves her chance of reproducing her genes if she has a mate who stays around to help and protect her while she is pregnant, giving birth, and nursing a small infant. By contrast, because a man's sperm is plentiful, he improves his chance of reproducing his genes if he tries to impregnate as many women as possible.
3. *Conclusion*: These biologically based reproductive strategies are encoded or "hard-wired" in our genes. Therefore, male promiscuity and female fidelity are necessary.

Table 3.2 contains data from a survey of a representative sample of Americans. It shows that a minority of adult American men (21 percent) claimed having more than one sex partner in the previous year. The figure for adult American women was significantly lower (10 percent). However, if we examine just married Americans, the figures fall to 5 percent for men and 1 percent for women, a much smaller

TABLE 3.2 Number of Sex Partners by Respondent's Sex, United States (percentage)

	RESPONDENT'S SEX	
NUMBER OF SEX PARTNERS	MALE	FEMALE
0 or 1	79	90
More than 1	21	10
Total	100	100
n (number of respondents)	1004	1233

SOURCE: Data from National Opinion Research Center, *General Social Survey, 1972–2002* (Chicago: University of Chicago, 2004).

TABLE 3.3 Number of Sex Partners by Respondent's Sex, United States, Married Respondents Only (Percentage)

	RESPONDENT'S SEX	
NUMBER OF SEX PARTNERS	MALE	FEMALE
0 or 1	95	99
More than 1	5	1
Total	100	100
n (number of respondents)	499	534

SOURCE: Data from National Opinion Research Center, *General Social Survey, 1972–2002.* (Chicago: University of Chicago, 2004).

difference (see Table 3.3). These differences indicate that a *social* arrangement, the institution of marriage, accounts in substantial measure for variation in male promiscuity. There is no *universal* propensity to male promiscuity.

Still, Table 3.2 indicates that 11 percent more men than women said they had more than one sex partner in the preceding year. Among unmarried people, the male–female difference was 14 percent. Sociologists attribute these gender differences to two main factors (McConaghy, 1999: 311–14). First, on average, men are more likely than women are to have same-sex sexual relations, and gay men are more likely than lesbians are to have many sex partners. This finding contradicts the evolutionary psychologists' argument that male promiscuity reflects an adaptive reproductive strategy because, clearly, gay men do not have sex with other men to make babies. Moreover, in-depth interviews suggest that men tend to exaggerate how many sexual partners they have because our *culture* puts a premium on male sexual performance. Genes and reproductive strategies play no role in this regard. We conclude that the evolutionary psychologists' claims about male promiscuity and female fidelity are false. So are many of their other claims about so-called behavioural universals.

A second problem with the evolutionary psychologists' argument is that little evidence links specific behaviours and social arrangements to specific genes. Finally, even if researchers discover an association between particular genes and particular behaviours, it would be wrong to conclude that variations among people are due only to their genes. Genes always develop in interaction with the environment; they *never* develop without environmental influence.

In sum, genes alone do not hard-wire your behaviour patterns. Changes in social environment produce physical change and, to an even greater degree, behavioural change. To determine the effects of the social environment on human behaviour, we need to abandon the premises of evolutionary psychology and use sociological skills to analyze the effects of social structure and culture.

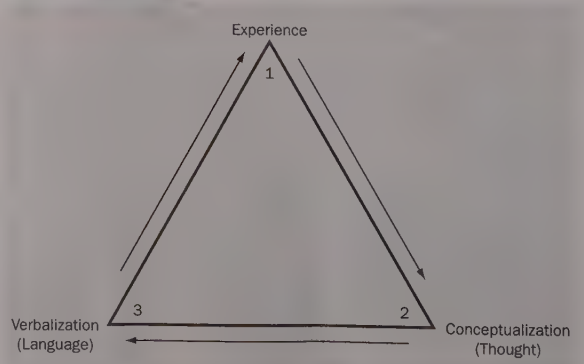
LANGUAGE AND THE SAPIR–WHORF THESIS

Language is one of the most important parts of any culture. A **language** is a system of symbols strung together to communicate thought. Equipped with language, we can share understandings, pass experience and knowledge from one generation to the next, and make plans for the future. In short, language allows culture to develop. Consequently, sociologists commonly think of language as a cultural invention that distinguishes humans from other animals.

In the 1930s, Edward Sapir and Benjamin Lee Whorf proposed an influential argument about the connection among experience, thought, and language. It is now known as the **Sapir-Whorf thesis** (Whorf, 1956). It holds that we experience important things in our environment and form concepts about those things (path 1 to 2 in Figure 3.1). Then we develop language to express our concepts (path 2 to 3). Finally, language itself influences how we see the world (path 3 to 1).

For example, different types of camels are important in the environment of nomadic Arabs, and different types of snow are important in the lives of the Inuit in Canada's Far North and Alaska, and the Sami people in northern Finland, Norway, Russia, and Sweden (path 1 to 2). Consequently, nomadic Arabs

FIGURE 3.1 The Sapir–Whorf Thesis



have developed many words for different types of camels and the Inuit and the Sami have developed many terms for different types of snow (path 2 to 3). Distinctions that these people see may elude us because types of camels and snow are less important in our environment (Krupnik and Müller-Wille, 2010; Neil, 2014). On the other hand, terms that are familiar to every Canadian hockey fan—poke-check, slot, five-hole, tic-tac-toe—are unlikely to have equivalents in, say, Japanese.

In turn, language obliges people to think in certain ways (path 3 to 1). If you're walking in a park, you will know whether a certain tree is in front of you, behind you, to the left, or to the right. When asked where the tree is, you will use such directions to describe its position. We think "egocentrically," locating objects relative to ourselves. However, egocentric directions have no meaning for speakers of Tzeltal in southern Mexico or of Guugu Yimithirr in Queensland, Australia. They lack concepts and words for "left," "right," and so on. They think geographically and will say that the tree is to the "north," "south, "east," or "west." Trained from infancy to attend to geographic direction, Tzeltal speakers are obliged to think in those terms. If a tree to the north is located behind them and they are asked where the tree is, they will point to themselves, as if they don't exist. Reportedly, a Tzeltal speaker can be blindfolded, put in a dark room, and spun around 20 times until he's dizzy yet still point without hesitation to the north, south, east, and west (Boroditsky, 2010; Deutscher, 2010).

Taking an example closer to home, income and power inequality between women and men encourages some men to use terms like *fox*, *babe*, *bitch*, *ho*, and *doll* to refer to women. The use of such words in itself influences men to think of women simply as sexual objects. Feminist theorists argue that thinking about women in this way sustains a **rape culture** on college and university campuses and in society as a whole. In a rape culture, sexual harassment, slut-shaming, the trivialization of rape, victim-blaming, and sexual assault are widespread. For large sections of the population, these actions seem normal. As some members of the Me Too Movement emphasize, if men are ever going to think of women as equals, actual gender inequality will have to be reduced—but the language such men use to refer to women will also have to change.

TIME FOR REVIEW

1. What are the tools in the human "cultural survival kit?" How do they improve the survival chances of people?
2. How do evolutionary psychologists and sociologists differ in their explanations of human behaviour?
3. How does language shape the way we think? Give an example from your own experience.

CULTURE AS FREEDOM AND CONSTRAINT

A FUNCTIONALIST ANALYSIS OF CULTURE: CULTURE AND ETHNOCENTRISM

Despite its central importance in human life, culture is often invisible. That is, people tend to take their own culture for granted. It usually seems so sensible and natural that they rarely think about it. In contrast, people are sometimes startled when confronted by cultures other than their own. The ideas, norms, values, and techniques of other cultures may seem odd, irrational, and even inferior.

Judging another culture exclusively by the standards of our own is known as **ethnocentrism**. Ethnocentrism impairs sociological analysis. This fact can be illustrated by Marvin Harris's (1974) functionalist analysis of a practice that seems bizarre to many Westerners: cow worship among Hindus in India.

Many Hindus refuse to slaughter cattle and eat beef because, for them, the cow is a religious symbol of life. In India, some pinup calendars portray the heads of beautiful women with the bodies of fat white cows, milk jetting out of each teat. Cows are permitted to wander the streets, defecate on the sidewalks, and stop to chew their cud in busy intersections or on railroad tracks, forcing traffic to a complete halt. In Chennai, police stations maintain fields where stray cows that have fallen ill can graze and be nursed back

Taking public transportation often forces us to abandon our culturally defined personal space. However, this abandonment of personal space is itself a cultural norm.

SOURCE: © Mario Tama/Getty Images.

to health. The government even runs old-age homes for cows, where dry and decrepit cattle are kept free of charge. All this special care seems mysterious to most Westerners because it takes place amid poverty and hunger that could presumably be alleviated if only people would slaughter their "useless" cattle for food instead of squandering scarce resources to feed and protect these animals.

According to Harris (1974: 3–32), however, ethnocentrism misleads many Western observers. Cow worship, it turns out, is an economically rational practice, especially in rural areas. For one thing, most Indian peasants can't afford tractors, so cows are needed to give birth to oxen, which are in high demand for plowing. For another, the cows produce hundreds of millions of kilograms of recoverable manure, half of which is used as fertilizer and the other half as a cooking fuel. With oil, coal, and wood in short supply, and with the peasants unable to afford chemical fertilizers, cow dung is, well, a godsend. What is more, cows in India don't cost much to maintain because they eat mostly food that is not fit for human consumption. And they represent an important source of protein as well as a livelihood for members of low-ranking castes, who have the right to eat beef and dispose of the bodies of dead cattle. (A **caste** is a hereditary class authorized by religion.) These "untouchables" form the workforce of India's large leather craft industry. The protection of cows by means of cow worship is thus a sensible and efficient economic practice. It seems irrational only when judged by the standards of Western agribusiness.

Harris's analysis of cow worship in rural India is interesting for two reasons. The first lesson is about ethnocentrism: If you refrain from judging other societies by the standards of your own, you will have taken an important first step toward developing a sociological understanding of culture.

The second lesson is that functionalist theory can illuminate otherwise mysterious social practices. You will recall from Chapter 1 the functionalist claim that social structures have consequences that make social order possible. Some of those consequences are manifest functions that are intended and easily observed, while others are latent functions that are unintended and less obvious (Merton, 1968 [1949]). Harris discovered that cow worship performs a range of latent functions, showing how a particular social practice has unintended consequences that make social order possible.

TIME FOR REVIEW

What is your favourite part of popular culture (TV, video games, movies, popular music, or something else)? Outline the elements of a functionalist interpretation of culture and apply it to the element of popular culture that you selected.

CULTURE AS FREEDOM

SYMBOLIC INTERACTIONISM AND CULTURAL PRODUCTION

Some sociologists emphasize the way in which culture acts as an independent variable *causing* the establishment of certain patterns of social relations. Other sociologists emphasize the way in which culture acts as a dependent variable. From the latter viewpoint, culture is an *effect* of certain patterns of social relations.

Harris's analysis of cow worship in India illustrates the second case. In Harris's view, social relations in India—in particular, social relations that result in a relatively low level of economic development—are such that the protection of cows becomes an economic necessity. The social necessity presumably gives rise to an aspect of Hinduism: the belief among individuals that cows are holy. Some conflict theorists take a similar view about the relationship between social relations and cultural consequences.

Symbolic interactionists take the opposing view. For them, people are not empty vessels into which society pours a defined assortment of beliefs, symbols, and values. Rather, elements of culture result from human creativity and choice; we are at liberty to give meaning to the people and things in our environment. From this point of view, culture is the outcome of our choices, and culture shapes and constrains our social relations. Some poststructuralists hold a similar view about the relationship between human creativity as the source of culture and of structured social relations.

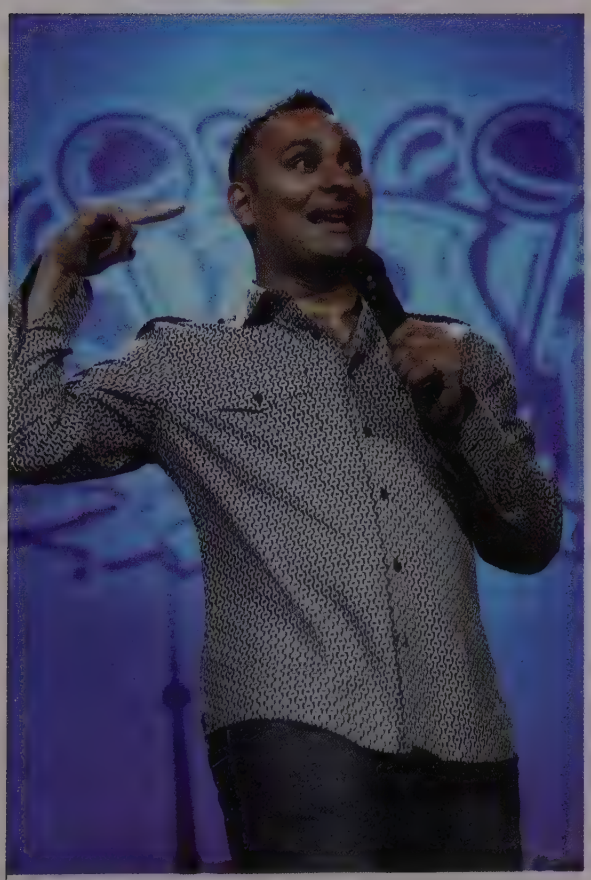
In the remainder of this chapter we probe these two faces of culture—culture as freedom and culture as constraint.

CULTURAL DIVERSIFICATION

> This is a nice room tonight. When I look out, I see all kinds of different people. I see Black, White, Asian, everybody hangin' out, havin' a good time. . . . This type of thing is not going to be able to happen about 300 years from now. You realize that? . . . You

realize there's not going to be any more white people? There's not going to be any more black people? Everyone's going to be beige.... It's true, the whole world's mixing. There's nothing you can do about it. Eventually, we're all going to become some hybrid mix of Chinese and Indian. It's inevitable. They're the two largest populations in the world. So you can run from us now. But sooner or later, we're going to hump you.... But I'm thinkin' if we're all going to mix anyway, let's start mixing people now that would never normally mix just to see what we'll get. You know, hook up a Jamaican with an Italian. They could have little Pastafarians. I'm Indian. I could hook up with a Jewish girl and we could have little Hinjews. A woman from the Philippines, a guy from Holland—little Hollapinos. A guy from Cuba, a woman from Iceland—little Ice-cubes. A French and a Greek—Freaks. A German and a Newfie—little Goofies. It's gonna happen. We might as well help it along.

—Russell Peters (2009)



Russell Peters

SOURCE: © ZUMA Press, Inc./Alamy.

Part of the reason we are increasingly able to choose how culture influences us is that a greater diversity of culture is available from which to choose. Changes to Canada's immigration policy since the 1960s have ensured that we are undergoing cultural diversification at a faster pace than any other country with the exception of Australia. In 2016, we admitted 296 346 immigrants, and this number is expected to grow in the future. A high rate of immigration ensures that we are exposed to a sumptuous buffet of cultural options in everything from the food we eat to the people we date, court, and marry.

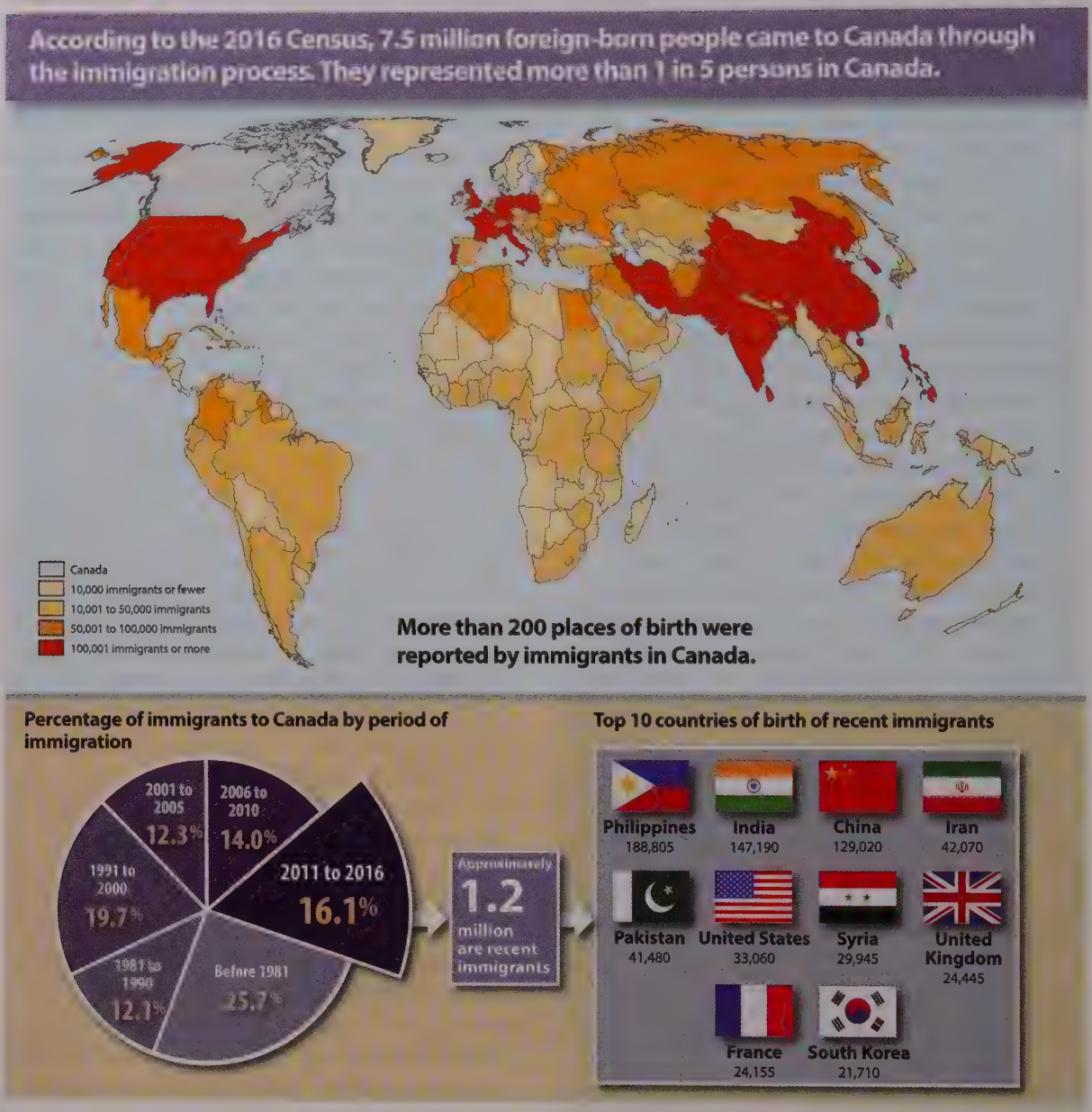
Canada used to be composed almost exclusively of Christians from northern Europe and an Indigenous minority. Then, in the 1960s, Canada eliminated overt racism in its immigration policies, and the country began to diversify culturally. About 95 percent of immigrants who arrived in Canada before 1961 came from Europe and the United States. Between 2011 and 2016, about 87 percent of immigrants came from places *outside* Europe and the United States (Statistics Canada, 2017a; Figure 3.2). Because of the inflow of immigrants from such places as the Philippines, India, China, and Pakistan, more than 22 percent of the population are now members of visible minority groups. About three-quarters of visible minority Canadians reside in Toronto, Vancouver, and Montreal, with most of the rest residing in Edmonton, Calgary, and Winnipeg.

MULTICULTURALISM

A second reason why we are increasingly able to choose how culture influences us is that the government has made it easier to do so. In the 1970s, the Canadian government adopted a policy of **multiculturalism**, making Canada the world's first officially multicultural society. Multicultural policy promotes and funds the maintenance of culturally diverse communities, thus strengthening the trend toward cultural diversification (Fleras and Elliott, 2002). The multiculturalist principle is enshrined in the Canadian Charter of Rights and Freedoms, which forms the first part of the 1982 Constitution Act. With the passage of the 1988 Canadian Multiculturalism Act, the government confirmed its commitment to recognizing all Canadians as "full and equal participants in Canadian society."

Some of the effects of multiculturalism are evident in Canada's schools ("Canada," 2018). Although each province and territory has jurisdiction over education,

FIGURE 3.2 Immigrant Population in Canada, 2016 Census


According to the 2016 Census, 7.5 million foreign-born people came to Canada through the immigration process. They represented more than 1 in 5 persons in Canada.
Canada
10,000 immigrants or fewer
10,001 to 50,000 immigrants
50,001 to 100,000 immigrants
100,001 immigrants or more
More than 200 places of birth were reported by immigrants in Canada.
Percentage of immigrants to Canada by period of immigration
2001 to 2005 12.3%
2006 to 2010 14.0%
2011 to 2016 16.1%
1991 to 2000 19.7%
1981 to 1990 12.1%
Before 1981 25.7%
Approximately 1.2 million are recent immigrants
Top 10 countries of birth of recent immigrants
Philippines 188,805
India 147,190
China 129,020
Iran 42,070
Pakistan 41,480
United States 33,060
Syria 29,945
United Kingdom 24,445
France 24,155
South Korea 21,710

SOURCE: Statistics Canada. (2018). Immigrant population in Canada. https://www.statcan.gc.ca/pub/11-627-m/index-eng.htm (retrieved 10 January 2018).

until recent decades it was common for schools across Canada to stress the common elements of our culture, history, and society. Students learned the historical importance of the "charter groups"—the English and the French—in Canadian history. School curricula typically neglected the contributions of non-white, non-French, and non-English people to Canada's literary, artistic, and scientific development. Moreover, students learned little about the less savoury aspects of Canadian history, including Canada's racist immigration policies that sought to preserve Canada's "English stock" by restricting or denying entry to certain groups, including Chinese, blacks, and Jews (see Chapter 8, Race and Ethnic Relations). In general, history books were written from the perspective of the victors, not the vanquished.

For the past several decades, advocates of multiculturalism have argued that all levels of school curricula should present a more balanced picture of Canadian history, culture, and society—one that better reflects the country's ethnic and racial diversity in the past and its growing ethnic and racial diversity today. They argue that to the extent that school curricula are culturally biased, they fail to

provide students with the type of education a country devoted to multiculturalism must demand.

Critics maintain that our multiculturalist policies weaken Canada's social fabric. For one thing, they argue that multiculturalism encourages **cultural relativism**, which is the opposite of ethnocentrism. It is the idea that all cultures and cultural practices have equal value. The trouble with this view is that some cultures oppose values that most Canadians hold dear. Should we respect racist and antidemocratic cultures, such as the apartheid regime that existed in South Africa from 1948 until 1992? Or female circumcision, which is still widely practised in Somalia, Sudan, and Egypt? Critics argue that by promoting cultural relativism, multiculturalism encourages respect for practices that are abhorrent to most Canadians. Multiculturalists reply that cultural relativism need not be taken to an extreme; moderate cultural relativism encourages tolerance and should be promoted.

A CONFLICT ANALYSIS OF CULTURE: THE RIGHTS REVOLUTION

What are the social roots of cultural diversity and multiculturalism? Conflict theory suggests where we can look for an answer. Recall from Chapter 1 the central argument of conflict theory: Social life is an ongoing struggle between more- and less-advantaged groups. Privileged groups try to maintain their advantages, while subordinate groups struggle to increase theirs. And sure enough, if we probe beneath cultural diversification and multiculturalism, we find what has been called the **rights revolution**, the process by which socially excluded groups have struggled to win equal rights under the law and in practice.

After the outburst of nationalism, racism, and genocidal behaviour in World War II, the United Nations proclaimed the Universal Declaration of Human Rights in 1948. It recognized the "inherent dignity" and "equal and inalienable rights of all members of the human family" and held that every part of society should "strive by teaching and education to promote respect for these rights and freedoms" and "secure their universal and effective recognition and observance" (United Nations, 1998).

Fanned by such sentiment, the rights revolution was in full swing by the 1960s. Today, women's rights, Indigenous rights, gay and lesbian rights, the rights of people with special needs, constitutional rights, and language rights are a key part of our political discourse. As a result of the rights revolution, democracy has been widened and deepened (see Chapter 15, Politics and Social Movements). The rights revolution is by no means finished—many categories of people are still discriminated against socially, politically, and economically—but in much of the world, all categories of people now participate more fully than ever before in the life of their societies (Ignatieff, 2000).

The rights revolution raises some difficult issues. For example, groups that have suffered extraordinarily high levels of discrimination historically, such as Indigenous Canadians, Jewish Canadians, Chinese Canadians, and Japanese Canadians, have demanded reparations in the form of money, symbolic gestures, and, in the case of Indigenous Canadians, land and political autonomy.[2] Much controversy surrounds the extent of the obligation of current citizens to compensate for past injustices.

Another problem raised by the rights revolution concerns how we can achieve an acceptable balance between the right to be equal and the right to be different. For example, most residents of Quebec expect all Quebeckers to be able to compete on an equal footing for jobs, regardless of whether they are of French, English, or other origin. This is the right to equality. However, Quebeckers of French origin have also exercised their right to restrict nonfrancophones from expressing their right to be different. They have, for instance, passed laws restricting the use of English on public signs. These laws are controversial. Some English Quebeckers accept them as legitimate; others do not. Controversy therefore persists regarding the balance between the right to equality and the right to be different.

Specifically, the rights revolution fragments Canadian culture by (1) legitimizing the grievances of groups that were formerly excluded from full social participation, and (2) renewing their pride in their identity and heritage. Our history books, our literature, our music, our use of languages, and our very sense of what it means to be Canadian have diversified culturally. White, male, heterosexual property owners of northern European origin are still disproportionately influential in Canada, but our culture is no longer dominated by them in the way that it was just 50 or 60 years ago.

FROM DIVERSITY TO GLOBALIZATION

The cultural diversification we witness today is not evident in preliterate or tribal societies. In such societies, cultural beliefs and practices are virtually the

same for all group members. For example, many tribal societies organize **rites of passage**. These cultural ceremonies mark the transition from one stage of life to another (e.g., from childhood to adulthood) or from life to death (e.g., funerals). They involve elaborate procedures, such as body painting and carefully orchestrated chants and movements. They are conducted in public, and no variation from prescribed practice is allowed. Culture is homogeneous (Durkheim, 1976 [1915/1912]).

In contrast, preindustrial Western Europe and North America were rocked by artistic, religious, scientific, and political forces that fragmented culture. The Renaissance, the Protestant Reformation, the Scientific Revolution, the French and American Revolutions—between the fourteenth and eighteenth centuries, all of these movements involved people questioning old ways of seeing and doing things. Science placed skepticism about established authority at the very heart of its method. Political revolution proved nothing was ordained about who should rule and how they should do so. Religious dissent ensured that the Catholic Church would no longer be the supreme interpreter of God's will in the eyes of all Christians. Authority and truth became divided as never before.

Cultural fragmentation picked up steam during industrialization, as the variety of occupational roles grew, and new political and intellectual movements crystallized. Its pace is quickening again today because of globalization. Globalization, as defined in Chapter 1, is the process by which formerly separate economies, nation-states, and cultures are becoming tied together and people are becoming increasingly aware of their growing interdependence.

Globalization has many roots. International trade and investment are expanding. Members of different

Globalization: Tim Hortons opened its first franchise in the United Arab Emirates in 2011.
SOURCE: © Robert Brym.

ethnic and racial groups are migrating and coming into sustained contact with one another. A growing number of people from these diverse groups date, court, and marry across religious, ethnic, and racial lines. Influential "transnational" organizations have been created, such as the International Monetary Fund, the European Union, Greenpeace, Amnesty International, and *Médecins sans frontières*. Inexpensive international travel and communication make contacts between people from diverse cultures routine. The mass media make Ryan Gosling and *Game of Thrones* as well-known in Warsaw as in Winnipeg, while hip-hop is as popular in Senegal as it is in Saskatoon.

Globalization, in short, eliminates political, economic, and cultural isolation, bringing people together in what Canadian communications guru Marshall McLuhan (1964) called a "global village." Because of globalization, people are less obliged to accept the culture into which they are born and freer

The Coca-Cola Company was one of the first American companies to go global. Hebrew (left); Arabic (right).
SOURCE: (Left) © Jan Fritz/Alamy; (right) © Rob Crandall/The Image Works.

Critical Sociology

THE DECLINE AND DISAPPEARANCE OF LANGUAGES, INDIGENOUS CANADIAN AND OTHER

Someone once defined language as a dialect supported by an army and a navy (Weinreich, 1945: 13). The definition makes a lot of sense if we consider changes in language use worldwide. For centuries, Great Britain, the United States, France, Portugal, and Spain gained economic, political, and cultural influence over much of the world by employing military violence, supporting sympathetic local governments, helping to create new educational systems, fostering the spread of the mass media, and encouraging the use of their national languages.

The rise of English (and, to a lesser degree, French, Portuguese, and Spanish) has meant the elimination or endangerment of thousands of languages around the world spoken by the tribes of Papua New Guinea; the native peoples of the Americas; the national and tribal minorities of Asia, Africa, and Oceania; and marginalized European peoples, such as the Irish and the Basques. More than half the people in the world speak just 23 languages, but there are 7099 living languages in the world. Some 34.8 percent of the world's languages are endangered, with the rate of extinction now being about 600 languages per century (Simons and Fennig, 2017). *All* of Canada's Indigenous languages fall into the "endangered" category.

How did Canada's more than 70 Indigenous languages become endangered? To make way for European colonists' farms, industries, railroads, and towns, the government segregated most Indigenous people on "reserves," often by force. However, Sir John A. Macdonald, our first prime minister, saw the reserve system as a problem when it came to educating children. As he wrote in 1879:

> When . . . the child lives with its parents, who are savages, and though he may learn to read and write, his habits and . . . mode of thought are Indian. He is simply a savage who can read and write. It has been strongly impressed upon myself . . . that Indian children should be withdrawn as much as possible from the parental influence, and the only way to do that would be to put them in central training industrial schools where they will acquire the habits and modes of thought of white men (quoted in Joseph, 2016).

Here we have the core idea for what became Canada's residential school system, a network of government-funded, church-run schools that over the course of their existence housed and trained some 150 000 Indigenous children. The residential schools aimed to help the children "escape" their cultures, facilitating their assimilation into white, European Canadian culture. After being removed from their families, they were placed in an alien environment where malnourishment and abuse—emotional, physical, and sexual—were widespread. Some 4 percent of the children died while in the "care" of residential school staff members. Any hint of Indigenous culture was strictly forbidden. Use of Indigenous languages was punished (Brym, 2018).

The effect on Indigenous language use was telling. As late as the 1951 census, fully 87.4 percent of Indigenous Canadians said they could still speak an Indigenous language. By 1996, the figure had plummeted to 29.3 percent. In that year, the last residential school was shut down, but by then the capacity to sustain Indigenous languages had been so massively eroded that the figure continued to fall. In 2016, just 15.5 percent of Canada's 1.67 million Indigenous people claimed they could carry on a conversation in an Indigenous language. Today, most of Canada's Indigenous languages are spoken by fewer than 1000 people (Burnaby and Beaujot, 1987: 36; Statistics Canada, 2017b; Table 3.4). True, some young people are now learning an Indigenous language as a second language, but not enough to stem the decline.

Much of the culture of a people—its prayers, humour, conversational styles, technical vocabulary, myths, and way of thinking—is expressed through language. Therefore, the loss of language amounts to the disappearance of tradition and in some cases, even identity, and their replacement by the traditions and identity of a colonial power. These days, television, movies, and the Web play a leading role in speeding the loss (Woodbury, 2003).

Critical Thinking Questions

1. Within a single language group, some ways of speaking are considered proper and others are considered improper. What social factors distinguish those who speak in ways that are considered proper from those who speak in ways that are considered improper?
2. How are proper ways of speaking a language imposed on people? Consider both formal (institutional) and informal (face-to-face) mechanisms.

(*continued*)

(continued)

TABLE 3.4 Speakers of Indigenous Languages in Canada, 2016

LANGUAGE GROUP	SPEAKERS	GEOGRAPHICAL CONCENTRATION OF SPEAKERS
Algonquian (Cree, etc.)	175 825	Manitoba, Quebec, Ontario, Alberta, Saskatchewan
Inuit (Inuktitut, etc.)	42 065	Nunavut, Quebec
Athabaskan (Dene, etc.)	23 455	Saskatchewan, Northwest Territories, British Columbia
Salish (Shuswap, etc.)	5 620	British Columbia
Siouan (Stoney, etc.)	5 400	Alberta, Manitoba
Iroquoian (Mohawk, etc.)	2 715	Ontario, Quebec
Other	6 180	British Columbia

SOURCE: Statistics Canada. (2017b). The Aboriginal languages of First Nations people, Métis and Inuit. http://www12.statcan.gc.ca/census-recensement/2016/as-sa/98-200-x/2016022/98-200-x2016022-eng.cfm (retrieved 9 January 2018).

to combine elements of culture from a wide variety of historical periods and geographical settings.

Nonetheless, people tend to select elements of *dominant* cultures over elements of *subordinate* cultures. This tendency is clearly evident in the way people decide to speak some languages rather than others (see the Critical Sociology feature, The Decline and Disappearance of Languages, Indigenous Canadian and Other).

POSTMODERNISM

Some sociologists think that so much cultural fragmentation and reconfiguration has taken place in the last few decades that a new term is needed to characterize the culture of our times: **postmodernism**.

Scholars often characterize the last half of the nineteenth century and the first half of the twentieth century as the era of modernity. During this hundred-year period, belief in the inevitability of progress, respect for authority, and consensus around core values characterized much of Western culture. In contrast, postmodern culture involves an eclectic mix of elements from different times and places, the erosion of authority, and the decline of consensus around core values. Let us consider each of these aspects of postmodernism in turn.

Blending Cultures

A mixing of diverse elements from different times and places is the first aspect of postmodernism. In the postmodern era, it is easier to create individualized belief systems and practices by blending facets of different cultures and historical periods. Take religion. Although 73 percent of Canadians still say they believe in God or a higher power and 69 percent continue to identify as Christians, increasing numbers now identify themselves as adherents of non-Christian religions (7 percent) or as having no religious affiliation (24 percent) (Bibby, 2017: 66, 223; Chapter 12, Religion).

In addition, Canadians are increasingly showing a willingness to combine conventional religious beliefs with a wide assortment of other supernatural beliefs and practices, including astrology, tarot, New Age mysticism, psychic phenomena, and communication with the dead (Bibby, 1987: 233; 2001: 195; 2017: 174). Simply put, we have many more ways to express spirituality than we used to. A person can easily construct a personalized religion drawing on different religions much like consumers shop in a mall. Meanwhile, churches, mosques, synagogues, and other religious institutions have diversified their offerings to appeal to the spiritual, leisure, and social needs of religious consumers and retain their loyalties in the competitive market for congregants and parishioners (Finke and Stark, 1992).

Erosion of Authority

The erosion of authority is the second aspect of postmodernism. Half a century ago, Canadians were likely

A hallmark of postmodernism is the combining of cultural elements from different times and places. In 2007, an addition to the Royal Ontario Museum, known as the Michael Lee-Chin Crystal, was opened in Toronto. In the eyes of some, it created a postmodern marvel. In the eyes of others, it created a postmodern nightmare.

SOURCE: © VH-tochange/Alamy.

to defer to authority in the family, schools, politics, and medicine. Today, we are more likely to challenge authority and hold parents, teachers, politicians, and doctors in lower regard. In the 1950s, for example, Robert Young played the firm, wise, and always-present father in the TV hit *Father Knows Best*. In the 2010s, the typical TV father is more like Homer Simpson or Phil Dunphy in *Modern Family*: a fool.

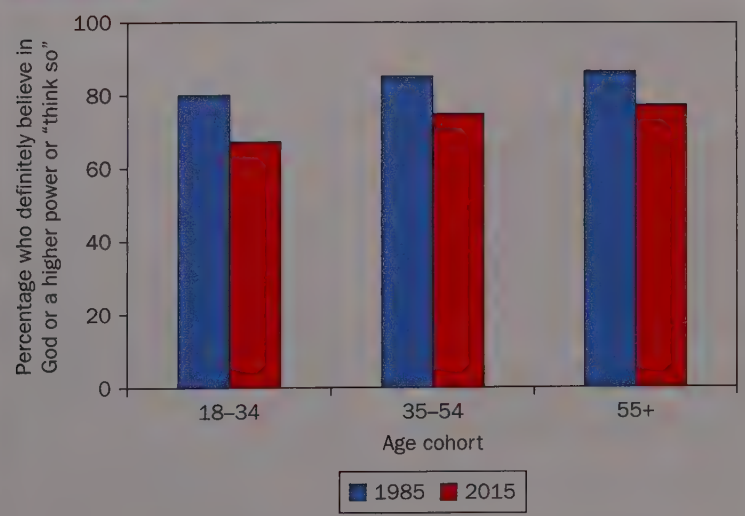
Another illustration of the erosion of authority concerns belief in God or a higher power. Surveys stretching over the past three decades show not only that the percentage of Canadians saying they are inclined to believe in God or a higher power has declined but that the decline is steepest in the youngest age cohort (Figure 3.3). Finally, consider that voting and other forms of conventional politics are less popular than they used to be—an indication, one could argue, of a decline in political authority (Figure 3.4).

Instability of Core Values

The decline of consensus around core values is the third aspect of postmodernism. Half a century ago, most people's values remained stable during their adult lives and many values were widely accepted. Today, value shifts are more rapid and consensus has broken down on many issues. For example, in the middle of the twentieth century, most adults remained loyal to one political party from one election to the next. However, specific issues and personalities have increasingly eclipsed party loyalty as the driving forces of Canadian politics (Johnston, 2012). Today, people are more likely to vote for different political parties in succeeding elections than they were in 1950.

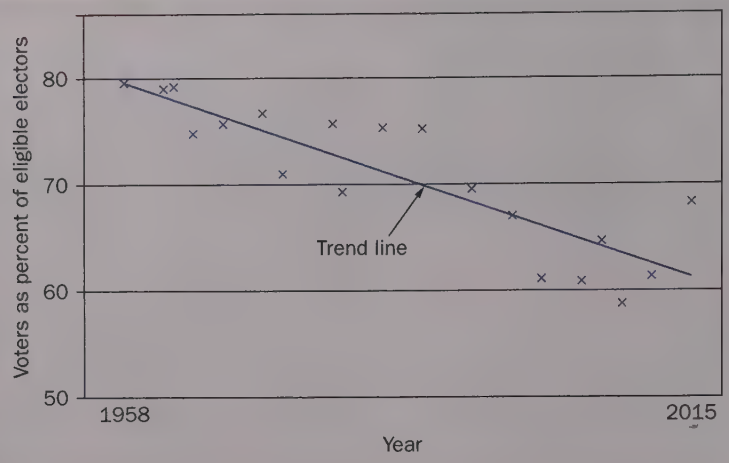
The decline of consensus can also be illustrated by considering the fate of Big Historical Projects. For most of the past two hundred years, consensus throughout the world was built around Big Historical Projects. Various social movements convinced people they could take history into their own hands and

FIGURE 3.3 Belief in God or a Higher Power by Age Cohort, Canada, 1985 and 2015



SOURCES: Reginald Bibby, *Project Canada 1985 National Survey*; Reginald Bibby and Angus Reid, 2015 Angus Reid Institute *Religion Survey*.

FIGURE 3.4 Voter Turnout in Canadian Federal Elections



SOURCE: Elections Canada (2016). *Retrospective Report on the 42nd General Election of October 19, 2015*. At marnehttp://www.elections.ca/content.aspx?section=res&dir=rec/eval/pes2015/ege&document=p1&lang=e#a4 (retrieved 10 January 2016).

create a glorious future just by signing up. German Nazism was a Big Historical Project. Its followers expected the Reich to enjoy a thousand years of power. Communism was an even bigger Big Historical Project, mobilizing hundreds of millions of people for a future that promised to end inequality and injustice for all time. However, the biggest and most successful Big Historical Project was not so much a social movement as a powerful idea—the belief that progress is inevitable, that life will always improve, mainly because of the spread of democracy and scientific innovation.

The twentieth century was unkind to big historical projects. Russian communism lasted 74 years. German Nazism endured a mere 12. The idea of progress fell on hard times as 100 million soldiers and civilians died in wars; the forward march of democracy took wrong turns into fascism, communism, and regimes based on religious fanaticism; and pollution from urbanization and industrialization threatened the planet. In the postmodern era, people increasingly recognize that apparent progress, including scientific advances, often have negative consequences. As the poet E. E. Cummings once wrote, "Nothing recedes like progress."

IS CANADA THE FIRST THOROUGHLY MODERN POSTMODERN COUNTRY?

Until the mid-1960s, the image of Canadians among most sociologists was that of a stodgy people: peaceful, conservative, respectful of authority, and therefore quite unlike our American cousins.

According to conventional wisdom, the United States was born in open rebellion against the British motherland. Its Western frontier was lawless. Vast opportunities for striking it rich bred a spirit of individualism. Thus, American culture became an anti-authoritarian culture.

Canada developed differently according to the conventional view. It became an independent country not through a revolutionary upheaval but in a gradual, evolutionary manner. The Northwest Mounted Police and two hierarchical churches (Roman Catholic and Anglican) established themselves on the Western frontier before the era of mass settlement, allowing for the creation of an orderly society rather than a "wild West." Beginning with the Hudson's Bay Company, large corporations quickly came to dominate the Canadian economy, hampering individualism and the entrepreneurial spirit. Thus, Canadian culture became a culture of deference to authority. That, at least, was the common view until the 1960s (Lipset, 1963).

Although the contrast between deferential Canadian culture and anti-authoritarian American culture may have had some validity 40 or 50 years ago, it is an inaccurate characterization today (Adams, 1997: 62–95). As we have seen, the questioning of authority spread throughout the Western world beginning in the 1960s. Nowhere, however, did it spread as quickly and thoroughly as in Canada. Canadians used to express more confidence in big business than

Americans did, but surveys now show the opposite. Canadians used to be more religious than Americans were, but that is no longer the case. Fewer Canadians (in percentage terms) say they believe in God and fewer attend weekly religious services. Confidence in government has eroded more quickly in Canada than in the United States. Americans are more patriotic than Canadians are, according more respect to the state. Finally, Americans are more likely than Canadians are to regard the traditional nuclear family as the ideal family form and to think of deviations from tradition—same-sex couples, single-parent families, cohabitation without marriage—as the source of a whole range of social problems. So, whether sociologists examine attitudes toward the family, the state, government, religion, or big business, they now find that Americans are more deferential to traditional institutional authority than Canadians are.

Because Canadians are less deferential to traditional institutional authority than Americans are, some commentators say that Canadians lack a distinct culture. For example, American patriotism sparks awareness of great national accomplishments in art, war, sports, science, and, indeed, all fields of human endeavour. Anthems, rituals, myths, and celebrations recognize these accomplishments and give Americans a keen sense of who they are and how they differ from non-Americans. Not surprisingly, therefore, a larger percentage of Americans than of Canadians think of themselves as "Americans" plain and simple rather than, say, Italian Americans. In Canada, a larger percentage of the population thinks of itself in hyphenated terms; compared with the Americans, our identity is qualified, even tentative.

Does this mean that Canadians lack a distinct national culture? Hardly. It means that although American culture is characterized by a relatively high degree of deference to dominant institutions, Canadian culture is characterized by a relatively high degree of tolerance and respect for diversity. We are more likely than Americans are to favour gender equality, accept gay and lesbian relationships, encourage bilingualism and multiculturalism, and accept the right of Indigenous peoples to political autonomy. Characteristically, a large international survey by a condom manufacturer found that Americans have sex more often than Canadians do, but Canadians are most likely to say that the pleasure of their partner is very important. As public opinion pollster Michael Adams wrote,

> Twenty-five years of public-opinion polling in Canada has taught me a seemingly paradoxical truth. Canadians feel strongly about their weak attachments to Canada, its political institutions and their fellow citizens. In other words, they feel strongly about the right to live in a society that allows its citizens to be detached from ideology and critical of organizations, and not to feel obliged to be jingoistic or sentimentally patriotic. Canadians' lack of nationalism is, in many ways, a distinguishing feature of the country (1997: 171).

In short, Canadian culture is distinctive, and its chief distinction may be that it qualifies us as the first thoroughly postmodern country.

TIME FOR REVIEW

1. Contrast ethnocentrism and cultural relativism. How is it possible to avoid both extremes?
2. What are the major forces that have led to cultural diversification and greater freedom to make cultural choices since World War II?
3. In what sense is Canada the first truly postmodern country?

CULTURE AS CONSTRAINT

We noted previously that culture has two faces. One we labelled "freedom," the other "constraint." Diversity, globalization, and postmodernism are all aspects of the new freedoms that culture allows us today. We now turn to an examination of two contemporary aspects of culture that act as constraining forces on our lives: rationalization and consumerism.

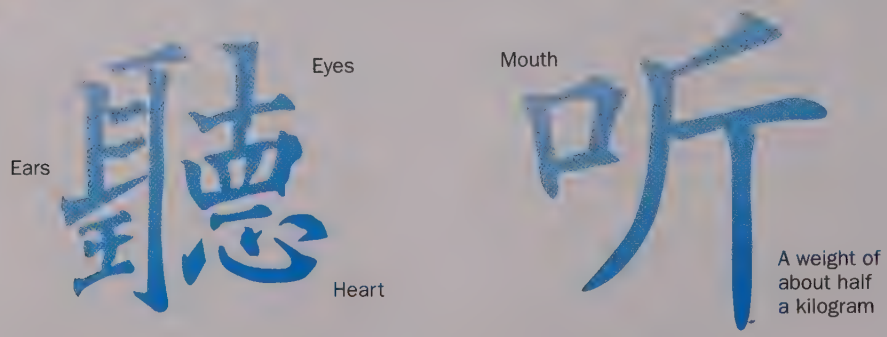
RATIONALIZATION

At the turn of the twentieth century, the great German sociologist Max Weber coined the term **rationalization** to describe the application of the most efficient means to achieve given goals and the unintended, negative consequences of doing so. He claimed that rationalization is creeping into all spheres of life (see Figure 3.5). In Weber's view, rationalization is one of the most constraining aspects of contemporary culture (Weber, 1958 [1904-05]): 181).

The constraining effects of rationalization are evident, for example, even in something as basic as the way we measure and use time. People did not always let the clock determine the pace of daily life. The first

FIGURE 3.5

Reprinted here are the Chinese characters for "listening" (t'ing) in traditional Chinese script (left) and simplified, modern script (right). Each character is composed of several word-symbols. In traditional script, listening is depicted as a process involving the eyes, the ears, and the heart. It implies that listening demands the utmost empathy and involves the whole person. In contrast, modern script depicts listening as something that involves merely one person speaking and the other "weighing" speech. Modern Chinese script has been rationalized. Has empathy been lost in the process?



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mechanical clocks were installed in public squares in Germany seven centuries ago to signal the beginning of the workday, the timing of meals, and quitting time. Workers were accustomed to enjoying a flexible and vague work schedule regulated only approximately by the seasons and the rising and setting of the Sun. The strict regime imposed by the work clocks made their lives harder. They staged uprisings to silence the clocks, but to no avail. City officials sided with employers and imposed fines for ignoring the work clocks (Thompson, 1967).

Today, few people rebel against the work clock. This is especially true of urban North American couples who are employed full-time in the paid labour force and have young children. For them, life often seems an endless round of waking up at 6:30 a.m.; getting everyone washed and dressed; preparing the kids' lunches; getting them out the door in time for the school bus or the car pool; driving to work through rush-hour traffic; facing the speed-up at work resulting from the recent downsizing; driving back home through rush-hour traffic; preparing dinner; taking the kids to their soccer game; returning home to clean up the dishes and help with homework; getting the kids washed, their teeth brushed, and then into bed; and (if they have not brought some office work home) grabbing an hour of TV before collapsing, exhausted, for perhaps six hours' sleep before the story repeats itself (Statistics Canada, 2011).

Life is generally less hectic for residents of small towns, unmarried people, couples without young children, retirees, and the unemployed. But the lives of others are typically so packed with activities that they must carefully regulate time and parcel out each moment so they can tick off one item after another from an ever-growing list of tasks that need to be completed on time. After 700 years of conditioning, allowing clocks to precisely regulate our activities seems the most natural thing in the world, although there is of course nothing natural about it.

The regulation of time ensures efficiency. It maximizes how much work you get done in a day. It enables trains to run on schedule, university classes to begin punctually, and business meetings to start on time. However, many people complain that life has become too hectic to enjoy.

For sociologist George Ritzer, the McDonald's fast-food restaurant epitomizes the rationalization process. Ritzer speaks of the "McDonaldization" of the world, by which he means that the organizational principles of the fast-food restaurant are coming to dominate everywhere (Ritzer, 1993, 1996). At McDonald's, a set list of carefully weighed food portions with identical ingredients are cooked according to a uniform and precisely timed process. But, says Ritzer, the application of assembly-line procedures to meal preparation is dehumanizing for both employees and customers. The work is done by mainly non-unionized, uniformed, teenage workers who receive minimum wage. To boost sales, they are required to smile as they recite fixed scripts ("Would you like some fries or a drink with your burger?").

Nearly half of all McDonald's employees are so dissatisfied with their work that they quit after a year or less. Meanwhile, customers are expected to spend as little time as possible eating the food—hence the

drive-through window and small express outlets in subways and department stores where customers eat standing up or on the run. In short, McDonald's executives have carefully thought through every aspect of your lunch. With the goal of making profits, they have rationalized food preparation, making it as inexpensive and as fast as possible.

Taking McDonaldization to a new extreme, one restaurant in Japan has even installed a punch-clock for its customers. The restaurant offers all you can eat for 35 yen per minute. As a result, "the diners rush in, punch the clock, load their trays from the buffet table, and concentrate intensely on efficient chewing and swallowing, trying not to waste time talking to their companions before rushing back to punch out. This version of fast food is so popular that, as the restaurant prepares to open at lunchtime, Tokyo residents *wait in line*" (Gleick, 2000: 244; emphasis in the original).

Meanwhile, in New York and Los Angeles, some upscale restaurants have gotten in on the act. An increasingly large number of business clients are so pressed for time that they feel the need to pack in *two* half-hour lunches with successive guests. The restaurants oblige, making the resetting of tables "resemble the pit-stop activity at the Indianapolis 500" (Gleick, 2000: 155). As the examples of the work clock and fast food show, rationalization enables us to do just about everything more efficiently, but we lose much in the process.

CONSUMERISM

In a famous study, Max Weber argued that early Protestants believed they could reduce their religious doubts and attain a state of grace if they worked diligently and lived modestly. They believed that "the care for external goods should lie on one's shoulders only 'like a light cloak, which can be thrown aside at any moment.'" However, Weber continued, "fate decreed that the cloak should become an iron cage" (Weber, 1958 [1904-05]: 181). Weber's "iron cage" remark points to a second constraining aspect of culture that has been evident for some time: consumerism. **Consumerism** is the tendency to define ourselves in terms of the goods and services we purchase.

When applied to the production of goods and services, the rationalization process enables us to produce more efficiently, to have more of just about everything than previous generations had. However, it is consumerism that ensures that most of the goods we produce will be bought. We have lots of choices. We can select from dozens of styles of running shoes,

Consumerism ties one's identity to the purchase of "external goods" that no longer "lie on one's shoulders only 'like a light cloak, which can be thrown aside at any moment'" (Weber, 1958 [1904-05]: 181).

SOURCE: © Barbara Kruger. Courtesy: Mary Boone Gallery, New York.

cars, toothpaste, and all the rest. We can also choose to buy items that help define us as members of a **subculture**, that is, adherents of a set of distinctive values, norms, and practices within a larger culture.

But, individual tastes aside, we all have one thing in common: We tend to be good consumers. We are motivated by advertising, which is based on the accurate insight that people will tend to be regarded as cultural outcasts if they fail to conform to stylish trends. By creating those trends, advertisers push us to buy, even if doing so requires that we work more and incur large debts. That is why the "shop-till-you-drop" lifestyle of many North Americans prompted French sociologist Jean Baudrillard to remark pointedly that even what is best in North America is compulsory (Baudrillard, 1988 [1986]).

Recent innovations in advertising take advantage of our tendency to define ourselves in terms of the goods we purchase. For example, when channel surfing and the use of personal video recorders became widespread, advertisers realized they had a problem. Viewers started skipping TV ads that cost millions of dollars to produce. As a result, advertisers had to think up new ways of drawing products to the attention of consumers. One idea they hit on was paying to place their products in TV shows and movies. They realized that when Brad Pitt or some other big star drinks a can of Coke or drives a Lincoln, members of the audience tend to associate the product with the star. Wanting to be like the star,

Critical Sociology CONTROL AND CREATIVITY ON THE INTERNET

Although the Internet is an advertising medium dominated by large corporations, it would be wrong to think of it only as a cultural constraint insofar as it is an effective way of manipulating consumer behaviour. After all, individual users make independent, creative contributions to Internet culture all the time. People upload 400 hours of YouTube videos every *minute* (DMR, 2018). Twitter has 328 million active users (Statista, 2018). Add to this the many millions of personal websites, public-access cameras, online dating sites, alternate reality and multiple-user gaming sites, and discussion groups devoted to every imaginable topic, and one must temper the image of the Internet as a medium that is just a cultural constraint.

Specifically, the Internet (including social media) increases human freedom because it offers people opportunities to manipulate the way they present themselves to others and explore aspects of their selves that they may suppress in physical social interaction. The difference between self-presentation offline and online is typically modest. Nonetheless, differences exist, and they can change self-conceptions in ways that are usually minor but sometimes major. Some people learn to become more assertive online than they are offline, and it is possible that once they learn to be bolder, they carry the lesson into real life to a degree. In some cases, people "in the closet" with respect to their sexual preferences use social media as a gateway to "coming out." In these and other ways, social media serve as "identity workshops" (Turkle, 1995).

In addition, the Internet allows people to increase social interaction and build community—but not community in the traditional sense. Traditional communities are fixed locations. To interact in them, you must reside in them physically. You don't get to select community members. Everybody knows your business. In contrast, the Internet encourages the crystallization of communities that are multiplex (you can belong to many of them), variegated (you can decide how intimately you want to interact with different members of different communities), personalized (you can decide who to allow in and who to exclude), portable (you can take them with you), and ubiquitous (you can take them anywhere you please) (Wellman, 2014).

Finally, the Internet opens new ways of engaging in social change. People advocate and spread awareness of a wide variety of environmental, human rights, and other causes using blogs, Twitter, Facebook, and activist websites containing reports, news, videos, announcements, and Web links. People also use social media to mobilize others for demonstrations, petitions, meetings, support concerts, and fundraising (see Chapter 15, Politics and Social Movements).

In all of these ways, then, the Internet may be as much a means of increasing cultural freedom as it is a cultural constraint.

Critical Thinking Question

1. For you personally, is the Internet (including social media) more of a cultural constraint or a means of increasing your cultural freedom?

they are more likely to buy the product. The product becomes a symbol of what many viewers want to be, again demonstrating that consumerism, like rationalization, acts as a powerful constraint on our lives.

A more important innovation in advertising is evident on the Internet. Google generated US$95.4 billion in ad revenue in 2017, most of it by placing search ads on people's computer, tablet, and cellphone screens (Castillo, 2018). The ads are tailored to people's interests as revealed by their online behaviour: the websites they visit, what they buy online, their location, and their sociodemographic characteristics. It is no accident that when Google Search, Facebook, or Amazon suggest books for you to consider purchasing, they recommend titles that interest you. Nor should you be surprised to see a pop-up ad announcing that your favourite comedian will be performing in your city next month. Such ads are tailored to your interests and are therefore more effective in generating sales than, say, a roadside billboard for a refrigerator you don't need (see the Critical Sociology feature, Control and Creativity on the Internet).

Advances in artificial intelligence promise to boost consumerism to new heights. Amazon claims that by 2020 it will be automatically delivering products to people *before they know they want them* (Pittis, 2018). This is not just a simple matter of figuring out the rate at which your household uses toilet paper and delivering a dozen rolls of your favourite brand before you run out. Knowing Lin's pattern of behaviour on the Web—opinionated posts, product selections, news and musical preferences, and so on—Amazon will know that Lin adores Ariana Grande, that she is performing in Lin's city on May 24, that Lin has a boyfriend, and that his birthday is coming up that very week. Based on this information, Amazon will decide

to email Lin two concert tickets for the quality of seats she has bought in the past. Returns will be free, but Lin's credit card will automatically be charged if she uses the tickets. "What a good idea," Lin may well say when she reads the email, "and how convenient that Amazon did nearly all the thinking for me!"

FROM COUNTERCULTURE TO SUBCULTURE

In concluding my discussion of culture as a constraining force, I want to note that consumerism is remarkably effective at taming countercultures. **Countercultures** are subversive subcultures. They oppose dominant values and seek to replace them. The hippies of the 1960s formed a counterculture and so do environmentalists today.

Countercultures rarely pose a serious threat to social stability. Most often, the system of social control, of rewards and punishments, keeps countercultures at bay. In our society, consumerism acts as a social control mechanism that normally prevents countercultures from disrupting the social order. It does that by transforming deviations from mainstream culture into means of making money and by enticing rebels to become entrepreneurs (Frank and Weiland, 1997). The development of hip-hop helps to illustrate the point (Brym, 2014).

Hip-hop originated in the American inner city in the 1970s. At the time, manufacturing industries were leaving the inner city for suburban or foreign locales, where land values were lower and labour was less expensive. Unemployment among African American youth rose to more than 40 percent. At the same time, many middle-class blacks left the inner city for the suburbs. Their migration robbed the remaining young people of successful role models. It also eroded the taxing capacity of municipal governments, leading to a decline in public services. Meanwhile, the American public elected conservative governments at the state and federal levels. They cut school and welfare budgets, thus deepening the destitution of ghetto life (Piven and Cloward, 1977: 264–361; Wilson, 1987).

With few legitimate prospects for advancement, poor African American youth in the inner city turned increasingly to crime and, in particular, the drug trade. In the late 1970s, cocaine was expensive and demand for the drug was flat. Consequently, in the early 1980s, Colombia's Medellin drug cartel introduced a less expensive form of cocaine called *rock* or *crack*. Crack was inexpensive, it offered a quick and intense high, and it was highly addictive. It offered many people a temporary escape from hopelessness and soon became wildly popular in the inner city. Turf wars spread as gangs tried to outgun each other for control of the local traffic. The sale and use of crack became so widespread, it corroded much of what was left of the inner-city African American community (Davis, 1990).

The shocking conditions described above gave rise to a shocking musical form: hip-hop. Stridently at odds with the values and tastes of both whites and middle-class African Americans, hip-hop described and glorified the mean streets of the inner city while holding the police, the mass media, and other pillars of society in utter contempt. Furthermore, hip-hop tried to offend middle-class sensibilities, black and white, by using highly offensive language.

In 1988, more than a decade after its first stirrings, hip-hop reached its political high point with the release of the album *It Takes a Nation of Millions to Hold Us Back* by Chuck D and Public Enemy. In "Don't Believe the Hype," Chuck D accused the mass media of maliciously distributing lies. In "Black Steel in the Hour of Chaos," he charged the FBI and the CIA with assassinating the two great leaders of the African American community in the 1960s: Martin Luther King and Malcolm X. In "Party for Your Right to Fight," he blamed the federal government for organizing the fall of the Black Panthers, the radical black nationalist party of the 1960s. Here, it seemed, was an angry expression of subcultural revolt that could not be tamed.

However, the seduction of big money did much to mute the political force of hip-hop. As early as 1982, with the release of Grandmaster Flash and the Furious Five's "The Message," hip-hop began to win acclaim from mainstream rock music critics. With the success of Run-DMC and Public Enemy in the late 1980s, it became clear there was a big audience for hip-hop. Significantly, much of that audience was composed of white youths. As one music critic wrote, they "relished . . . the subversive 'otherness' that the music and its purveyors represented" (Neal, 1999: 144). Sensing the opportunity for profit, major media corporations, such as Time/Warner, Sony, CBS/Columbia, and BMG Entertainment, signed distribution deals with the small independent recording labels that had formerly been the exclusive distributors of hip-hop CDs. In 1988, *Yo! MTV Raps* debuted on MTV. The program brought hip-hop to middle America.

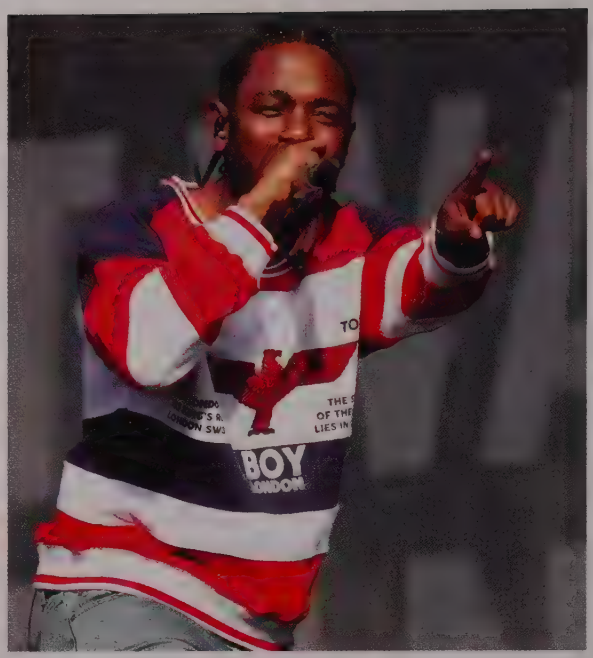
Most hip-hop recording artists proved they were eager to forgo political relevancy for commerce. For instance, WU-Tang Clan started a line of clothing called WU Wear, and, with the help of major hip-hop

recording artists, companies as diverse as Tommy Hilfiger, Timberland, Starter, and Versace began to market clothing influenced by ghetto styles. Independent labels, such as Phat Farm and Fubu, also prospered. Puff Daddy reminded his audience in his 1999 CD, *Forever*: "N—— get money, that's simply the plan." According to *Forbes* magazine, he became one of the country's 40 richest men under 40. By 2005, having renamed himself Diddy, he had his own line of popular clothing.

The members of Run-DMC once said that they "don't want nobody's name on my behind," but those days were long past by the early 1990s. Hip-hop was no longer just a musical form but a commodity with spin-offs. Rebellion had been turned into mass consumption. Hip-hop's radicalism had given way to the lures of commerce. A counterculture had become a subculture.

Radical political currents in hip-hop still exist. For example, in 2012, Macklemore and Lewis's first hit, "Same Love," criticized homophobia in hip-hop and promoted gay rights. Their single, "Thrift Shop," which topped the *Billboard* "Hot 100" for six weeks and won a Grammy award for best rap song in 2014, is a critique of mindless consumerism. Kendrick Lamar's 2015 single, "Alright," became a rallying cry for the Black Lives Matter movement, which protests the disproportionate police violence visited on black people. Kendrick Lamar won a coveted Pulitzer Prize for his work in 2018. However, in terms of popularity, he is a minor current in the North American hip-hop universe. A list of the 100 wealthiest hip-hop artists ranks him 92nd. Macklemore ranks 66th ("Top 100 Richest Rappers & Hip-Hop Artists," 2018).

Radical currents seem to be more common outside North America. In Senegal, the playing of hip-hop highly critical of the government is widely believed to have helped topple the ruling party in the 2000 election. In France, North African youth living in impoverished and segregated slums use hip-hop to express their political discontent, and some analysts say the genre helped mobilize youth for antigovernment rioting in 2005 (Akwagyiram, 2009). *Rais Lebled* [Mr. President], a song by Tunisian rapper El Général, became the anthem of young people participating in the



Kendrick Lamar
SOURCE: © Twocoms/Shutterstock.

democratic uprisings in Tunisia, Egypt, and elsewhere in the Arab world in 2011: "Mr. President, your people are dying/People are eating rubbish/Look at what is happening/Miseries everywhere, Mr. President/I talk with no fear/Although I know I will get only trouble/I see injustice everywhere" (Ghosh, 2011).

In North America, however, hip-hop has become for the most part an apolitical commodity that increasingly appeals to a racially heterogeneous, middle-class audience. As one of hip-hop's leading analysts and academic sympathizers writes, "the discourse of ghetto reality or 'hood authenticity remains largely devoid of political insight or progressive intent" (Forman, 2001: 121). The fate of hip-hop is testimony to the capacity of consumerism to change countercultures into mere subcultures, thus constraining dissent and rebellion.

TIME FOR REVIEW

1. What are the causes of rationalization and consumerism? How do they constrain cultural choices?
2. Distinguish subculture from counterculture.

SUMMARY

1. **In what sense does culture increase the likelihood that humans will survive?**
   Culture increases the chance of human survival insofar as it enables people to adapt to their environments. In particular, the ability to create symbols, cooperate, and make tools has enabled humans to thrive.

2. **What is the best vantage point for analyzing culture?**
   Culture can be invisible if we are too deeply immersed in it. The cultures of others can seem inscrutable if we view them exclusively from the perspective of our own culture. Therefore, the best vantage point for analyzing culture is on the margins—neither too deeply immersed in it nor too much removed from it.

3. **How does the increasing complexity of society affect cultural freedom?**
   As societies become more complex, culture becomes more diversified and consensus declines in many areas of life. These processes increase human freedom, giving people more choice in their ethnic, religious, sexual, and other identities. So much cultural diversification and reconfiguration have taken place in recent decades that some sociologists characterize the culture of our times as postmodern. Postmodernism involves an eclectic mixing of cultural elements from different times and places, the erosion of authority, and the decline of consensus around core values. The rights revolution—the process by which socially excluded groups have struggled to win equal rights under the law and in practice—also underlies cultural diversification.

4. **How does the increasing complexity of society affect cultural constraint?**
   The growth of complex societies establishes limits within which diversification may occur. This fact is illustrated by increasing rationalization (the optimization of means to achieve given ends) and the growth of consumerism (which involves defining one's self in terms of the goods one purchases). Both of these processes are especially evident in advanced capitalist societies.

QUESTIONS TO CONSIDER

1. We imbibe culture but also create it. What elements of culture have you created? Under what conditions were you prompted to do so? Was your cultural contribution strictly personal or was it shared with others? Why?
2. Do you think of yourself in a fundamentally different way from the way your parents (or other close relatives or friends at least 20 years older than you) thought of themselves when they were your age? Are your attitudes toward authority different? Interview your parents, relatives, or friends to find out. Pay particular attention to the way in which the forces of globalization have altered ethnic, racial, and religious self-conceptions, and how your attitudes toward authority differ from those of your elders.
3. One of the main themes of this chapter is that rationality of means sometimes results in irrationality of ends. Select a sphere of culture (religion, education, the mass media, etc.) and illustrate the point.

GLOSSARY

Abstraction (p. 58) is the human capacity to create complex symbols, including languages, mathematical notations, and signs, in order to classify experience and generalize from it.

A **caste** (p. 62) is a hereditary class authorized by religion.

Consumerism (p. 73) involves defining ourselves in terms of the goods we purchase.

Cooperation (p. 58) is the human capacity to create a complex social life by establishing norms.

Countercultures (p. 75) are subversive subcultures. They oppose dominant values and seek to replace them.

Cultural relativism (p. 65) is the opposite of ethnocentrism. It is the idea that all cultures and all cultural practices have equal value.

Culture (p. 57) is the sum of socially transmitted practices, languages, symbols, beliefs, values, ideologies, and material objects that people create to deal with real-life problems. Cultures enable people to adapt to, and thrive in, their environments.

Ethnocentrism (p. 61) is the tendency to judge other cultures exclusively by the standards of our own.

A **language** (p. 60) is a system of symbols strung together to communicate thought.

Material culture (p. 58) comprises the tools and techniques that improve our ability to take what we want from nature.

Multiculturalism (p. 63) is a federal government policy that promotes and funds the maintenance of culturally diverse communities, thus strengthening the trend toward cultural diversification.

Norms (p. 58) are standards of behaviour or generally accepted ways of doing things.

Postmodernism (p. 68) is characterized by an eclectic mixing of cultural elements, the erosion of authority, and the decline of consensus around core values.

Production (p. 58) is the human capacity to make and use tools. It improves our ability to take what we want from nature.

In a **rape culture** (p. 61) sexual harassment, slut-shaming, the trivialization of rape, victim-blaming, and sexual assault are widespread. For large sections of the population, these actions seem normal.

Rationalization (p. 71) is the term Max Weber used to describe the application of the most efficient means to achieve given goals and the unintended, negative consequences of doing so. He claimed that rationalization is creeping into all spheres of life.

The **rights revolution** (p. 65) is the process by which excluded groups have sought to obtain equal rights under the law and in practice.

Rites of passage (p. 66) are cultural ceremonies that mark transitions from one stage of life to another or from life to death.

Sanctions (p. 59) are rewards and punishments intended to ensure conformity to cultural guidelines.

The **Sapir–Whorf thesis** (p. 60) holds that we experience certain things in our environment and form concepts about those things. We then develop language to express our concepts. Finally, language itself influences how we see the world.

The system of **social control** (p. 59) is the means by which members of society ensure that people conform to cultural guidelines.

A **society** (p. 57) involves people interacting socially and sharing culture, usually in a defined geographical area.

A **subculture** (p. 73) is a distinctive set of values, norms, and practices within a larger culture.

Symbols (p. 58) can be anything that carries a particular meaning, including the components of language, mathematical notations, and signs. Symbols allow us to engage in abstraction.

NOTES

1. New forms of society on the Internet ("virtual communities") show that physical proximity is not always a necessary part of the definition.
2. Many children of Indigenous Canadians were put into residential schools in the twentieth century, and many of them were physically and sexually abused by the ministers, priests, and nuns who ran these schools. Many Indigenous Canadians also claim that much land was taken from them illegally. Some 21 000 Japanese Canadians living within 160 kilometres of the Pacific Coast, three-quarters of them Canadian citizens, were forcibly moved to prisoner-of-war, internment, and work camps in 1942. They lost most of their property. Descendants of many Chinese Canadians were forced to pay an exorbitant "head tax" in the late nineteenth and early twentieth centuries, the purpose of which was to encourage them to leave the country. The Nazis enslaved and slaughtered millions of European Jews in World War II and stole their property. Survivors, a considerable number of them residing in Canada, later sought and received reparations from the German and Swiss governments.

CHAPTER 4

SOCIALIZATION

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Appreciate the degree to which social interaction unleashes human abilities, including the ability to see oneself as different from others.
- Evaluate how stages in life are influenced by the historical period in which people live.
- Contrast the declining socializing influence of the family over the past century with the rising socializing influence of schools, peer groups, and the mass media.
- Compare the greater speed, frequency, and comprehensiveness of identity change today with the lower speed, frequency, and comprehensiveness of identity change just a few decades ago.

THE CONSEQUENCES OF SOCIAL ISOLATION IN CHILDHOOD

One day in 1800, a 10- or 11-year-old boy was captured in the woods in southern France. He was filthy, naked, unable to speak, and had not been toilet trained. The boy was brought to Paris to be scrutinized by medical experts. How had he come to be living in the forest? A scar on his neck hinted at a horrific past. Was the boy an unwanted child, left to die in the woods after an unknown person slit his throat? No one knew.

Equally challenging was determining what was wrong with the boy, who came to be known as "the savage of Aveyron." Some experts said the boy was mentally retarded, others that he was a deaf-mute. One ambitious young doctor, Jean-Marc Itard, expressed a different view. He hypothesized that the boy's strangeness might be due to the effects of being raised in extreme isolation. Intrigued by the mysterious boy, Itard took over his care, called him Victor, and conducted an initial assessment of his capabilities. Next, Itard tried to teach Victor a few basic skills. The task was daunting. As he began his work, Itard recorded in his journal that this was a "disgustingly dirty child affected with spasmodic movements, and often convulsions, who swayed back and forth ceaselessly like certain animals in a zoo, who bit and scratched those who opposed him, who showed no affection for those who took care of him, and who was, in short, indifferent to everything and attentive to nothing" (Lane, 1976: 4, quoting from Itard's journal).

Itard's efforts to train Victor led to great fame for the doctor but little success with Victor. After a few years of trying to teach Victor how to read and communicate with others, Itard gave up. He wrote up his findings in a formal report, concluding that the project to educate and civilize Victor had been a total failure. Despite intensive training, Victor never mastered speech, displayed limited intellectual engagement, and failed to develop emotional attachments to people (Benzaquen, 2006).

Sadly, other cases of children lacking human contact at a critical stage in their development have emerged over the years. An especially shocking case, because of its mass scale, became known in 1989. That year, on Christmas Day, the rule of a corrupt Romanian dictator came to an abrupt end when he and his wife were executed by their own people. In the following months, the world learned the chilling details of how children had been treated by the regime. Because of harsh economic conditions, nearly 100 000 children had been abandoned by their families. Left in the hands of the state, the children were warehoused in orphanages that provided little food and even less love. The toll appeared greatest for those who had been abandoned at birth. Starving and listless, many babies were also strangely cross-eyed. Had they developed a strange illness? No. Because they had spent their short lives lying on their backs and staring at the blank ceiling overhead, these infants never had the opportunity to focus on objects, an activity that would have allowed their vision to develop properly.

Stunned by the deplorable conditions of the orphanages, families around the world descended on Romania to adopt the children. Approximately 600 of them were adopted by Canadians. Seizing the opportunity to learn more about the long-term effects of early life deprivation, researchers in Canada and elsewhere began to study some of these children. The researchers wondered whether the children could overcome their early neglect and grow up to become normal adults.

The results were mixed. A decade later, Romanian orphans who had been adopted by Canadians had caught up to Canadian children in weight and height (Le Mare and Audet, 2006). However, as in Victor's case, researchers discovered that the emotional scars of neglect run deep. The brains of the adopted Romanian children were smaller and less developed than they should have been, resulting in a wide array of emotional and intellectual deficits. As young adults, many reported struggling to fit in and some had been convicted of crimes.

The lesson seems clear. During the first few months of life, children must be exposed to other humans who will care for and love them. Otherwise, the neural structures that are responsible for emotional and intellectual development wither and die (Nelson, Fox, and Zeanah, 2014; Wade et al., 2019).

The examples of Victor and the Romanian orphans suggest that the ability to become human is only a potential. To be actualized, **socialization** must unleash the potential. Socialization is the process by which people learn to function in their culture. They do so by (1) entering and disengaging from a succession of roles and (2) becoming aware of themselves as they interact with others. A **role** is the behaviour expected of a person occupying a particular position in society.

TIME FOR REVIEW

1. What evidence suggests that children require contact with others to realize their human potential?
2. How and why do you think prolonged social isolation might affect adults differently from the way it affects young children?

FORMATION OF THE SELF

To paint a picture of the socialization process, I first review the main theories of how a sense of self develops during childhood, during which the contours of the self are first formed.

Driven by elemental needs, infants cry out. Those who hear their cries, usually their parents, respond by providing the infant with food, comfort, and affection. At first, infants do not seem able to distinguish themselves from their main caregivers. However, continued social interaction enables infants to begin developing a self-image or sense of **self**—a set of ideas and attitudes about who they are as independent beings.

SIGMUND FREUD

Austrian psychoanalyst Sigmund Freud proposed the first social-scientific interpretation of the process by which the self emerges (Freud, 1962 [1930]); 1973 [1915–17]). He noted that infants demand immediate gratification but begin to form a self-image when their demands are denied—when, for example, parents decide not to feed and comfort them every time they wake up in the middle of the night. The parents' refusal at first incites howls of protest. However, infants soon learn to eat more before going to bed, sleep for longer periods, and go back to sleep if they wake up. Equally important, the infant begins to sense that its needs differ from those of its parents, it has an existence independent of others, and it must somehow balance its needs with the realities of life.

Because of many such lessons in self-control, the child eventually develops a sense of what constitutes appropriate behaviour and a moral sense of right and wrong. Soon a personal conscience crystallizes. It is a storehouse of cultural standards. In addition, a psychological mechanism develops that normally balances the pleasure-seeking and restraining components of the self. Earlier thinkers believed that the self emerges naturally, the way a seed germinates. In a revolutionary departure from previous thinking on the subject, Freud argued that only social interaction allows the self to emerge.

CHARLES HORTON COOLEY

American scholars took ideas about the emergence of the self in a still more sociological direction. Notably, Charles Horton Cooley introduced the idea of the "looking-glass self," making him a founder of the symbolic interactionist tradition and an early contributor to the sociological study of socialization.

Cooley observed that when we interact with others, they gesture and react to us. This allows us to imagine how we appear to them. We then judge how others evaluate us. Finally, from these judgments we develop a self-concept or a set of feelings or ideas about who we are. In other words, our feelings about who we are depend largely on how we see ourselves evaluated by others. Just as we see our physical body reflected in a mirror, so we see our social selves reflected in people's gestures and reactions to us (Cooley, 1902).

For instance, when teachers evaluate students negatively, students may develop a negative self-concept that causes them to do poorly in school. Poor performance may have as much to do with teachers' negative evaluations as with students' innate abilities (Sanchez and Roda, 2003). Here we have the hallmarks of what came to be known as *symbolic interactionism*—the idea that in the course of face-to-face communication, people engage in a creative process of attaching meaning to things.

GEORGE HERBERT MEAD

George Herbert Mead (1934) further developed Cooley's idea of the looking-glass self. Like Freud, Mead noted that a subjective and impulsive aspect of the self is present from birth. Mead called it simply the **I**. Again like Freud, Mead argued that a repository of culturally approved standards emerges as part of the self during social interaction. Mead called this objective, social component of the self the **me**. However, while Freud focused on the denial of the impulsive side of the self as the mechanism that generates the self's objective side, Mead drew attention to the unique human capacity to "take the role of the other" as the source of the me.

Mead's Stages of Development: Role-Taking

Mead argued that the self develops in four stages of role-taking:

1. At first, children learn to use language and other symbols by imitating important people in their

lives, such as their mother and father. Mead called such people **significant others**.

2. Next, children pretend to be other people. That is, they use their imaginations to role-play in games such as "house," "school," and "doctor."
3. Then, about the time they reach the age of seven, children learn to play complex games that require them to take the role of several other people simultaneously. In baseball, for example, the infielders have to be aware of the expectations of everyone in the infield. A shortstop may catch a line drive. If she wants to make a double play, she must almost instantly be aware that a runner is trying to reach second base and that the person playing second base expects her to throw there. If she hesitates, she probably cannot execute the double play.
4. Once a child can think in this complex way, she can begin the fourth stage in the development of the self, which involves taking the role of what Mead called the **generalized other**. Years of experience may teach an individual that other people, employing the cultural standards of their society, usually regard her as funny, temperamental, or intelligent. A person's image of these cultural standards and how they are applied to her is what Mead meant by the generalized other.

PAUL WILLIS

Mead focused on childhood socialization. British sociologist Paul Willis (1990) usefully emphasized the degree to which identity formation continues among teens and young adults. He also paid more attention than Mead did to variations in the social contexts within which teens and young adults forge, maintain, and transform their identities.

For Willis, class, racial, ethnic, gender, and regional differences are associated with differences in socialization patterns. In addition, the institutions to which people belong provide them with symbolic resources that influence how they can express themselves and how others see them. These facts do not mean that people automatically learn the norms and values of the social contexts in which they happen to find themselves. They learn norms and values but also experiment and make choices from the variety of socialization opportunities they confront. Moreover, they are often helped by cultural industries, which seek to profit from the desire of young people to have fun, express themselves, and be stylish. Mass consumption of music, movies, and clothing are the accepted means by which youth experiment with identity and find their authentic selves.

By stressing the links among creativity, identity, and social context, Willis suggests that young people take advantage of every opportunity to make the everyday world around them meaningful and enjoyable. Like Mead, he reminds us that human beings are creative and strategic social actors, not pawns of vast, impersonal forces. Still, Willis acknowledges that social categories make a difference. The character of your socialization depends on the groups and institutions to which you belong and your statuses within those groups and institutions.

Until now, we have focused on how the self is shaped by social interaction and social institutions. Such reflections help us to see that we are a product of the society into which we are born. However, we must also recognize that society and its institutions are not static entities. They are always changing. The world that you were born into is not the same as the world into which your parents were born, and the world will be different yet again a generation from now. So when we say that society lives in us and makes us who we are (see Chapter 1), we are also saying society aims to create the type of people it needs to perpetuate its own existence.

Of course, the fit between a given society and the people it creates may not be tight. When enough people perceive that society does not work as it needs to, they protest. The outcry can lead society to adapt its institutions to accommodate their demands. For sociologists, then, thinking about how lives reflect the imprint of society, even as society itself is changing, reveals the full dynamic of the socialization process.

TIME FOR REVIEW

1. What makes Cooley's depiction of the "looking glass self" a *sociological* insight?
2. According to Mead, what is the distinction between the me and the I?
3. Why is it important to view youth as individuals who experiment with and choose among different identities?

AT THE INTERSECTION OF BIOGRAPHY AND HISTORY

Mead highlighted how the self emerges in stages. Yet the formation of the self is more than a developmental process. A person's potential is also shaped by

the unique slice of history through which he or she lives. Said differently, success and failure in life occur in part because of circumstances beyond our control. We tend to think that we are masters of our destiny but we are equally a product of our society: What we can become is made possible (or not) by the historical circumstances in which we live.

To illustrate this point, let us draw on the work of sociologist Norbert Elias, who compared the biographies of Mozart and Beethoven, two of the most well-known composers of all time. Although their musical legacy is undeniable today, their life stories are quite different.

Mozart was born fewer than 20 years before Beethoven but enjoyed far less financial success. The reason, according to Elias, was that Mozart lived during a time when musicians had few options to support themselves outside of a patronage system in which wealthy individuals sponsored a few lucky musicians for pleasure and prestige. Mozart, who resented being treated as an inferior, broke away from his patron, and tried instead to support himself by selling his music. However, times were tough and few people could afford to pay him for his work. Mozart was often in debt and struggled to keep his household afloat.

In contrast, Beethoven's career took off when economic conditions were on the upswing and many people were willing to pay for musical compositions. Consequently, when Beethoven too decided to leave the comfort of his patron, he was flooded with requests for his music from wealthy people. He thrived in this environment, never worrying about where his next meal might come from. Had Beethoven been born within a year or two of Mozart, his life would have more closely resembled that of Mozart. Their contrasting fortunes depended less on their own actions and more on their differing historical circumstances.

What is true in this regard for individuals is true for the characteristic way that entire civilizations develop: Identifiable social circumstances in specific historical situations leave their imprint on individuals' socialization processes and on the cultures of entire civilizations.

Contrast ancient China with ancient Greece. In large part because of complex irrigation needs, the rice agriculture of ancient southern China required substantial cooperation among neighbours. It had to be centrally organized in an elaborate hierarchy within a large state. Harmony and social order were therefore central to ancient Chinese life. Ancient Chinese thinking, in turn, tended to stress the importance of mutual social obligation and consensus rather than debate. Ancient Chinese philosophy focused on the way whole systems, not discrete analytical categories, cause processes and events.

In contrast, the hills and seashores of ancient Greece were suited to small-scale herding and fishing, so ancient Greece was less socially complex than ancient China was, and it was more politically decentralized. It gave its citizens more personal freedom. Consequently, philosophies tended to be analytical, which means, among other things, that processes and events were viewed as the result of discrete categories rather than whole systems. Markedly different cultures—patterns of behaviour and styles of thinking—grew up on these different cognitive foundations. Civilizational differences depended less on the innate characteristics of the ancient Chinese and Greek "mind" than on the structure of their societies in their formative years.

Sociologists who study socialization focus on the following questions: How does society shape identities, attitudes, and behaviour as individuals move through life? How do societies differ in the ways they organize life transitions, life stages, and life trajectories? How are changing societies, changing biographical patterns, and the subjective experiences of individuals related to one another? In the next sections of this chapter, I touch on each of these questions (Shanahan and Macmillan, 2008).

SOCIOLOGY OF THE LIFE COURSE

All individuals pass through distinct stages of life, which, taken in its entirety, sociologists call the **life course**. As individuals sequentially move through the stages of life on the path from birth to death, they experience a predictable pattern of age-graded roles and responsibilities. In that sense, the life course can be thought of as a social structure: Our life courses have been organized for us by the society we live in.

Sometimes the stages of life are marked by **rites of passage**, or rituals signifying the transition from one life stage to another (Fried and Fried, 1980). Baptism, confirmation, the bar mitzvah and bat mitzvah, high-school graduation, college or university convocation, the wedding ceremony, and the funeral are among the best-known rites of passage in Canada.

Rituals do not mark all transitions in the life course, however. For example, in Canada, people often complain about the "terrible twos," when

Critical Sociology MUST I BE MY AGE?

Born in the Netherlands on March 11, 1949, Emile Ratelband believes that his birthdate is the source of his problems. According to Emile, the obligation to report his birth date on job applications and dating websites has frustrated efforts to find meaningful work and love. Confident that he has much to offer, Emile wants his birth date to reflect the age he *feels*. To that end, Emile took the unusual step of legally applying to change his birth date to March 11, 1969.

Emile's claim was promptly rejected. In its decision, the court ruled that rights and obligations in Dutch law are based on age. Approving his application would render these requirements meaningless, with undesirable legal and social consequences. Emile was instead encouraged to pursue other alternatives for challenging age discrimination. Emile remains undeterred and plans to appeal the decision. As he argues: "We live in a time when you can change your name and your gender. Why can't I change my age?"

Sociologists would say that Emile's feelings toward his age are not uncommon. In fact, there is a well-established pattern. Young adults usually report their subjective age (how old they feel) as older than their chronological age, whereas older adults generally say they feel younger than their actual age (Rubin and Berntsen, 2006). It's possible that feeling younger delivers health benefits and slows cognitive decline among seniors, say the experts (Choi and DiNitto, 2014; Stephan, Sutin, and Terraciano, 2017). What do you think? Should this information sway the courts to rule in Emile's favour?

Critical Thinking Questions

1. Do you think that it will ever be possible to obtain the right to change one's date of birth? Why, or why not?
2. If most older people feel younger than their chronological age, what does this say about the views society holds about the aging process?

toddlers first begin to defy parental demands in their attempt to gain autonomy. Similarly, when some Canadian men reach the age of about 40, they experience a "midlife crisis," in which they attempt to defy the passage of time and regain their youth. (It never works.)

The age-graded roles and expectations that define each stage of life vary from one society and historical period to the next. For example, most societies have laws regulating the minimum age for purchasing tobacco products, drinking alcohol, driving a vehicle, and voting. As the public became more disapproving of cigarette smoking over the past half century, there was a gradual rise in the legal age at which one could buy tobacco products in Canada. Today, depending on what province you live in, the minimum age at which one can purchase cigarettes may be 18 or 19. Similarly, in the 1960s, Canada established 65 as the age of retirement. When life expectancy continued to rise, concerns arose that retirees might exhaust their savings and government pension plans would become insolvent. To avoid these problems, most provinces abolished mandatory retirement. As a result, the proportion of seniors in the labour market has soared, and the number of Canadians expecting to retire at 65 has fallen (Bélanger, Carrière, and Sabourin, 2016).

In the same way, each society sets its own rules about when a person becomes an adult. In preindustrial societies, adulthood arrived soon after puberty. In Canada, adulthood occurs at 18 (the legal voting age and the legal drinking age in some provinces) or 19 (the legal drinking age in other provinces). In Thailand, a person must wait until age 20 to become an adult. Age-graded roles are embedded in institutions in ways that serve the interests of society and facilitate the journey of its members through the life course. This observation may explain the uphill battle Emile Ratelband faces in trying to convince authorities he should be allowed to change his birth date (see the Critical Sociology feature, Must I Be My Age?).

CHILDHOOD, ADOLESCENCE, AND EMERGING ADULTHOOD

Did you know that the number of stages in the life course varies historically and across societies? For instance, childhood was treated as a brief phase of life in medieval Europe (Ariès, 1962 [1960]). In wealthy societies, childhood has become a prolonged stage of development. Adolescence follows childhood now, but it was virtually unknown just a few hundred years ago (Gillis, 1981). More recently, some have posited a new

stage of life after adolescence, aimed at capturing the unique experiences of those between the ages of 18 and 25, and possibly extending up to age 29 (Arnett, 2000). Young adults are viewed as occupying an in-between space: they have reached the age of majority, but because most have yet to start careers or get married, adulthood still feels a distance away. Today, adulthood appears to be fully achieved when people reach their early 30s, by which time most of them have completed their formal education, married, and "settled down."

How did childhood and adolescence come to be recognized as distinct stages of life? In preindustrial societies, children were considered small adults. From a young age, they were expected to conform as much as possible to the norms of the adult world. They were put to work as soon as they could contribute to the welfare of their families. This often meant doing chores by the age of 5 and working full-time by the age of 10 or 12. Marriage, and thus the achievement of full adulthood, was common by the age of 15 or 16.

Children in Europe and North America fit this pattern until the late seventeenth century, when the idea of childhood as a distinct stage of life emerged. At that time, the feeling grew among well-to-do Europeans and North Americans that boys should be permitted to play games and receive an education that would allow them to develop the emotional, physical, and intellectual skills they would need as adults. Girls continued to be treated as "little women" (the title of Louisa May Alcott's 1869 novel) until the nineteenth century. Most working-class boys did not enjoy much of a childhood until the twentieth century. Only in the last century or so has the idea of childhood as a distinct and prolonged period of life became universal in the West.

The idea of childhood emerged when and where it did because of social necessity and social possibility. An extended childhood was necessary in societies that required better-educated adults to do increasingly complex work because childhood gave young people a chance to prepare for adult life. Prolonged childhood was possible in societies where improved nutrition and hygiene allowed most people to live more than 35 years, the average lifespan in Europe in the early seventeenth century. In other words, before the late seventeenth century, most people did not live long enough to permit the luxury of childhood. Moreover, young people faced no social need for a period of extended training and development before the comparatively simple demands of adulthood were thrust upon them.

The introduction of compulsory schooling in Canada between 1871 and the 1920s put children in the spotlight. Over time, the educational system began dividing children according to their capabilities and assigning them to grades. The distinction facilitated the emergence of a new life stage: adolescence (Klein, 1990). Adolescence was similar to childhood in that it aimed to prepare people for adult responsibilities, but it offered more specialized instruction. The Great Depression of the 1930s crystallized the gap between childhood and adolescence. Economic hardship forced many teenagers to leave high school and take jobs to help support their families, but children in elementary grades were regarded as insufficiently skilled to make school-leaving worthwhile.

A comparable argument could be made for rising enrolment in postsecondary education and the identification of young adulthood as a new stage that separates adolescence from adulthood. In general, the elongation of the path from childhood to adulthood is to be expected as societies become more complex, requiring even greater preparation for adult roles and responsibilities.

AGE COHORT

As you pass through the life course, you learn new patterns of behaviour that are common to people about the same age as you. Sociologically speaking, a category of people born in the same range of years is called an **age cohort**. For example, all Canadians born in 1998 form an age cohort. **Age roles** are patterns of behaviour that we expect of people in different age cohorts. Age roles form an important part of our sense of self and others (Riley, Foner, and Waring, 1988). As we pass through the stages of the life course, we assume different age roles. To put it simply, a child is supposed to act like a child, an older person like an older person. We may think that a 5-year-old dressed in a suit is cute but look askance at a lone 50-year-old on a merry-go-round. "Act your age" is a demand that we make when people of any age do not conform to their age roles. Many age roles are informally known by character types, such as the "rebellious teenager" and the "wise old woman."

We find it natural that children in the same age cohort, such as preschoolers in a park, should play together or that people of similar age cluster together

at parties. Conversely, many people find romance and marriage between people widely separated by age problematic and even repulsive.

At the same time, no two cohorts have the same experience as they pass through the age structure. As each cohort confronts its own sequence of social events and circumstances, its members both change and are changed by their experiences.

GENERATION

A **generation** is a special type of age cohort. Many people think of a generation as people born within a 15- to 30-year span. Sociologists, however, usually define generation more narrowly. From a sociological point of view, a generation comprises members of an age cohort who have unique and formative experiences during youth. Age cohorts are statistically convenient categories, but members of a generation form a group with a collective identity and shared values.

Not all cohorts can become a generation. Generations are most likely to form during times of rapid social change. When society is in upheaval, young people seeking to find their way in the world cannot rely on the predictable patterns of the past but must carve out new trails. Revolutionary movements, whether in politics or the arts, are often led by members of a young generation who aggressively displace the ideas of the older generation (Eisenstadt, 1956; Mannheim, 1952).

Because Canadians live longer than ever, six identifiable generations exist today (see Table 4.1). In describing them, we recognize that generations tend to be clearest at their centre and fuzzier at their boundaries.

The generation that is currently passing away and whose experiences are increasingly known only through history books is often called the "Greatest Generation." Born between the early 1900s and 1928, members of this generation were at least 92 years old in 2020. They are called the Greatest Generation because they bravely survived the ordeals of the Great Depression (1929–1939) and World War II (1939–1945). By rising to the formidable challenges of these two events, the Greatest Generation laid the groundwork for economic prosperity and stability in the decades ahead.

The Greatest Generation was followed by the Silent Generation. Members of the Silent Generation were born between 1929 and 1945; in 2020, they were between the ages of 75 and 91. The Silent Generation is sometimes called the Traditionalist Generation because its members value hard work, thriftiness, and conformity. Craving security, the Silent Generation is risk-averse, patriotic, and community-minded. As a generation, its chief shortcoming is that it is not especially innovative. Its members often feel threatened by change.

As soldiers returned home after World War II and wanted to settle down, Canada experienced a baby boom that lasted until the mid-1960s. During this period, approximately 400 000 children were born each year. In 2020, baby boomers were between the ages of 56 and 74. When this cohort came of age in the 1960s and 1970s, they turned the stolid, comfortable world of their parents upside down. Baby boomers were the leading edge of a cultural revolution. The war in Vietnam, Trudeaumania, Canada's centenary, and popular music (the songs of the Beatles, the Rolling Stones, and the Guess Who) bound them together. Baby boomers have been characterized as idealistic, tolerant, and creative. In the workplace, they tend to be competitive, independent, and innovative. Their main weakness is the need for instant gratification. Because of their relative greed and self-absorption, baby boomers are often vilified for leaving massive debt for future generations (Higgs and Gilleard, 2010).

Generation X followed the baby boomers, and grew up in their shadow (Katz, 2017). Born between 1965 and 1981, they were between 39 and 55 years old in 2020. With both parents participating in the labour market, the members of this generation learned to be independent from an early age. Sometimes known as "latchkey children" because many of them returned to an empty home after school, they often spent their afternoons watching music videos on MuchMusic, one of the first specialty channels on cable TV, or playing Pong on their Ataris, the first successfully mass-marketed interactive gaming console. Popular television shows promoted idealistic images of intact families such as the Waltons, the Cosbys, and the Conners, but Generation X grew up at a time of rising divorce rates (Leidl, 2013).

As a group, Gen Xers tend to be skeptical, individualistic, pragmatic, and conservative with money (Gordinier, 2008; Watson, 2013). Many of them are entrepreneurial but seek work–life balance. Moreover, they often lack loyalty to their employer: If they see a better job, they will switch. This relative lack of loyalty is sometimes seen as a liability.

TABLE 4.1 Six Canadian Generations

GENERATION	AGE IN 2020	IN THEIR PRIME
The Greatest Generation (born 1928 or earlier)	92+	Members of this generation are sometimes called the "Greatest Generation" because they bravely survived the twin catastrophes of World War II and the Great Depression. SOURCE: Army [Numerical] (R112) Collection, Library and Archives Canada, accession number 1967-052 NPC, item 8243, PA-183765.
The Silent Generation (born between 1929 and 1945)	75–91	Members of the Silent Generation tend to value hard work, thriftiness, conformity, and security. They are often characterized as risk-averse, patriotic, and community-minded, but not especially innovative. SOURCE: © ClassicStock/Masterfile.
The baby boomers (born between 1946 and 1964)	56–74	The Woodstock festival in the summer of 1969 was one of the markers of the baby boomers' cultural revolution. They have been characterized as idealistic, tolerant, and creative. In the workplace, they tend to be highly competitive, independent, and innovative. SOURCE: © Ralph Ackerman/Getty Images.

(*continued*)

TABLE 4.1 Six Canadian Generations *(Continued)*

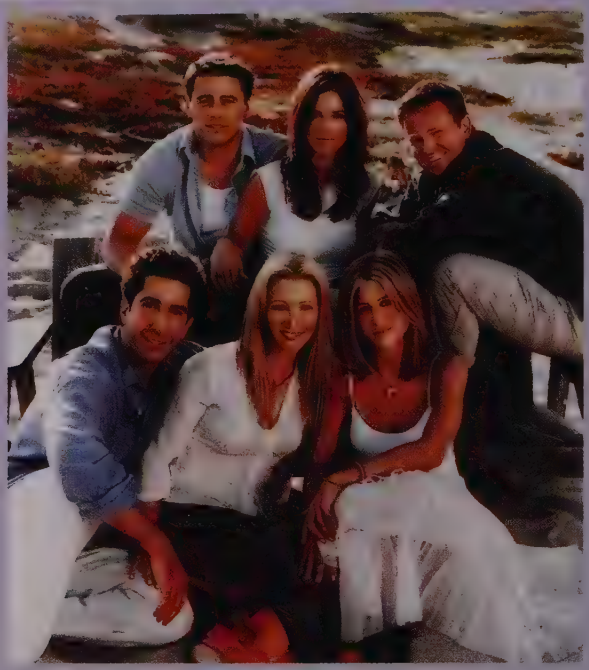
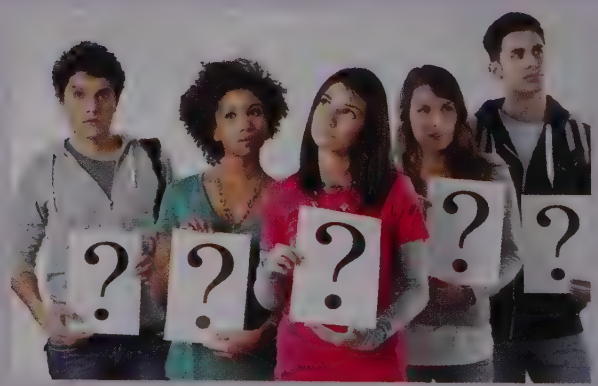
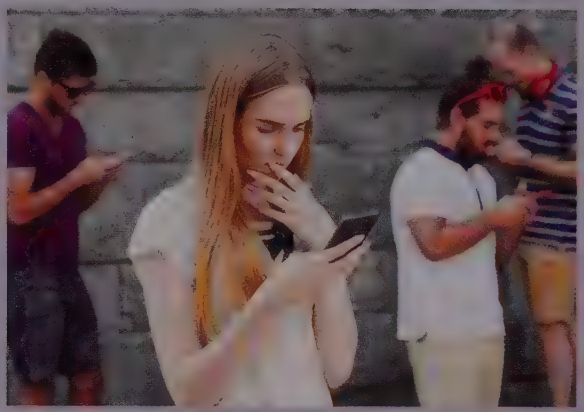
GENERATION	AGE IN 2020	IN THEIR PRIME
Generation X (born between 1965 and 1981)	39–55	 Members of Generation X were the first to grow up in a household where it was common for two parents to be in the paid labour market. Sometimes labelled "latchkey kids" because their parents were still working when they came home from school, Gen Xers developed independence at an early age. They are often described as skeptical, individualistic, pragmatic, and conservative with money. SOURCE: © Pictorial Press Ltd./Alamy.
Millennials (born between 1982 and 1994)	26–38	 The members of this generation are called "Millennials" because they came of age around the year 2000. As the largest generation in the workforce, Millennials tend to be environmentally conscious, have an unshakable faith that they can make a positive difference in the world, and are always searching for new experiences. Upper-middle-class and well-to-do members of this generation seem to be growing up more slowly than previous generations did, perhaps because of relative affluence and indulgent parenting styles. SOURCE: © Ridofranz/iStock/Getty Images Plus.

TABLE 4.1 *(Continued)*

GENERATION	AGE IN 2020	IN THEIR PRIME
Generation Z (born between 1995 and 2010)	10–25	



Generation Z is the generation that is now coming of age. Members of this generation seem to be assuming adult responsibilities even more slowly than the Millennials did. These digital natives have never known a world without smartphones and seem to be using them nearly every waking minute. Research suggests that relative lack of face-to-face interaction among members of Generation Z may be fuelling the rise of anxiety and depression.
SOURCE: © Photographee.eu/Shutterstock.

The Millennials, born between about 1982 and 1994, are so named because they came of age around the year 2000 (Howe and Strauss, 2009). They are also referred to as "Generation Y" or "Generation Me." They attended postsecondary institutions in record numbers, but the Great Recession (2008–09) put a damper on many of their career aspirations. To make a living, many Millennials shuttled between postsecondary education and precarious employment (Milkman, 2017). Today, Millennials have not only become the largest segment in the workforce, they are also a force to be reckoned with in politics. As a key demographic voting for the first time in the 2015 federal election, they made it possible for the Liberal government of Justin Trudeau to sweep into power. In the next few elections, they will represent the biggest voting bloc.

Millennials tend to be environmentally conscious, have an unshakable faith that they can make a positive difference in the world, and are always searching for new experiences (Pew Research Center, 2014). They are open-minded, overwhelmingly supporting the legalization of marijuana and gay rights, for example (Pew Research Center, 2019). They value teamwork and take technological advances such as the Internet for granted, but they often lack loyalty to their employer and have a relatively short attention span.

Finally, the members of Generation Z were born between 1995 and 2010, so they were between the ages of 10 and 25 in 2020. They stand apart from Millennials, with even shorter attention spans and stronger multitasking capabilities. Both generations are almost always connected to the Internet and social media through their smartphones, but differences can be observed. Millennials are more likely to use Facebook, whereas Generation Z prefers Instagram and Snapchat (Seemiller and Grace, 2019). Generation Z also shops differently. Whether it's a favourite meal from a nearby restaurant or a fancy pair of shoes, online shopping makes it possible for Generation Zers to purchase whatever they need from the comfort of their own homes.

The jury is still out as to how Generation Z will manage adult responsibilities. Some suggest Generation Z is growing up slowly, missing many of the milestones that marked the passage to adulthood in the past (Twenge, 2017). For example, fewer

youth today are dating, have had sexual intercourse, have obtained a driver's licence, or been drunk than previous generations did at their age. They may also be too attached to their smartphones. Insufficient amounts of face-to-face interaction may be fuelling the rise of anxiety and depression in this generation.

TIME FOR REVIEW

1. In what ways do the number and duration of life stages vary across societies and historical periods?
2. What transforms a cohort into a generation?

HOW SOCIALIZATION WORKS

Why is it that people turn out the way they do? A detailed answer to this question is complex, but the basic principles are not: People are surrounded and influenced by real or imagined others, who constitute a person's **social environment**. To satisfy individual needs and interests, every person needs to adapt to his or her environment. **Adaptation** involves arranging one's actions to maximize the degree to which an environment satisfies one's needs and interests.

The challenge of learning to ride a bicycle illustrates these concepts. If a girl wants to ride a bicycle, she cannot act any way she likes. To be successful, she must adjust her behaviour to satisfy the characteristics of the physical environment. In this case, the dominant environmental characteristic is gravity. On her first attempt, the novice cyclist will do her best, but her adaptive behaviour will likely be imperfect. As a result, the environment provides feedback in the form of skinned knees, scraped hands, and bruised legs. These are all signals that the environment is not cooperating. To gain cooperation, and satisfy her bike-riding interests, the girl must learn to balance herself on the bicycle. As she acquires the necessary skills, she can pay less attention to the motions she uses to stay on the bike and focus instead on arriving at her chosen destination.

The same process occurs in social environments, each of which has distinctive requirements. Different types of families make different kinds of demands on their children. Different kinds of schools have distinctive expectations of students. Neighbourhood environments differ, and so do friendship groups and every other social setting. Each of these environments shapes its participants through socialization. In an abusive family, the adaptive strategies children learn, and the kind of people they become, are very different from what they learn and become in a warm, supportive family.

Prolonged exposure to a given social environment mimics what happens for the experienced cyclist. One no longer needs to maintain awareness of the social forces that have made us who we are. Through habit and repetition, the social structures surrounding us become invisible. This is why it is so difficult to stand outside of our own experiences: We see the world through the lens of our own learning, forgetting that the lessons taught to others are not necessarily the same as our own.

As these examples make clear, socialization is fundamentally an evolutionary process. Simply stated, the steps in the process are as follows: (1) In any environment, a person acts on the basis of his or her existing personal characteristics and interests. (2) The environment responds to the person's actions more or less cooperatively. (3) The environmental response shapes the individual's conduct by either reinforcing existing patterns (cooperation) or encouraging change (resistance). In short, individual character leads to actions to which environments respond selectively. When environments respond cooperatively—when they satisfy individual needs—the rewards reinforce existing individual characteristics. When environments frustrate individual needs, change (learning) is encouraged.

AGENTS OF SOCIALIZATION

Each society has a range of institutions that prepare and guide successive cohorts through each stage of life. In the following sections, we discuss in turn families, schools, peer groups, and the mass media as "agents of socialization."

FAMILIES

The family is the most important agent of **primary socialization**, the process of mastering the basic skills required to function in society during childhood. The family is well suited to provide the kind of careful, intimate attention required for primary socialization. It is a small group, its members are in frequent face-to-face contact, and most parents love their children and are highly motivated to care for them. These characteristics make most families ideal for teaching small children everything from language to their place in the world.

At around 18 months of age, children begin to use gender labels and become aware of their own gender

As the first major agent of socialization, families help children to learn basic skills and internalize the values of their society.
SOURCE: © Meiko Arquillos/Getty Images.

Generations of children have grown up playing with LEGO® . Does LEGO promote gender stereotypes in marketing products to children and their parents? It does according to researcher Stephanie Reich and her colleagues (2018). Product lines such as LEGO City target boys, emphasizing physical prowess, problem solving, and heroism. LEGO Friends is aimed at girls, whose activities can be characterized as recreational or ornamental. Take Emma's House, for example, which on the LEGO website describes Emma watching a movie with her family, practising with makeup after a long bubble bath, having her friends come over to visit, and preparing tasty meals.
SOURCE: © studiomode/Alamy.

(Martin and Ruble, 2011). Where does this knowledge come from? Parents provide the material and social environment that help children "do" gender. Not only do parents act as role models, they organize play activities and shape their child's learning environment (Dinella and Weisgram, 2018).

It is parents who decide to dress children in gender-specific colours and read them books that feature characters in traditionally gendered family roles (McCabe et al., 2011). In boys' rooms, parents typically place sports equipment, cars, and action figures, but girls' rooms are usually outfitted with kitchen sets, dolls, and dress-up clothes (Leaper and Farkas, 2015; MacPhee and Prendergast, 2019).

Interestingly, parental preference for gender-typed toys is shaped by their own early childhood experience. Parents who played with gender-typed toys when they were young favour gender-typed toys for their own children, whereas parents who grew up with nontraditional toys tend to select nongender-typed toys for their children (Weisgram and Bruun, 2018).

Consider too the long-term effect of the family's religious atmosphere. Research shows that the main way religious groups grow is by recruiting and retaining children whose parents already belong to the group (Bengston, 2013; Bibby, 2001). Parents are the main source of their children's religious identification throughout life. Even Canadians who say they have abandoned the religious faith of their parents—or claim to have no religious identification—typically readopt the religious identities of their parents when they participate in rites of passage, such as marriage and baptism (Uecker, Mayrl, and Stroope, 2016). In these and many other ways, the family into which one is born exerts an enduring influence throughout the course of a person's life (see the Critical Sociology feature, Inequality across the Life Course).

Do not think that socialization within the family is solely a top–down transmission of values, where parents wield all the power in shaping who their children become. Children are not passive recipients of social processes. Rather, they give meaning to their experiences and actively participate in their own socialization. This means that the relationship between parents and children is bidirectional. Each influences the other.

Consider the experience of first-time parents. No instruction manual accompanies newborn children. It

Critical Sociology — INEQUALITY ACROSS THE LIFE COURSE

In the Scandinavian countries (Finland, Norway, Sweden, and Denmark), one's economic status in childhood does not strongly determine one's status in adulthood (Torche, 2015). These countries tend to offset inherited disadvantages by providing pathways out of poverty for those who are motivated to succeed. In contrast, in the United States, Italy, and South Africa, if you are the child of wealthy parents, then chances are good that you will be wealthy as an adult. If your parents are poor, you will find it difficult to escape poverty as an adult. There are simply too few ways in which one can break the cycle of disadvantage, no matter how hard one tries.

In every country, the resources parents have at their disposal are factors that shape how their children turn out. In Canada, only wealthier households can afford to send their children to the best schools, hire tutors for extra lessons, and purchase educational materials that foster learning. Consequently, wealthier children are primed to excel academically and so are more likely than are poor children to attain high levels of education and find financially rewarding jobs.

What wealthier parents can buy for their children represents only part of the advantage they give their children. Sociologist Annette Lareau (2011) described a profound difference between the ways in which middle-class parents socialize their children and how working-class parents interact with their children. Middle-class parents engaged in what Lareau called *concerted cultivation*, meaning that these parents felt it their duty to help their children develop to their fullest potential. They saw their children as "projects," and put the children into many different kinds of organized activities, including arts and team sports. It wasn't just that they could afford to do this; from their perspective, they couldn't afford *not* to expose their children to all that life had to offer. Middle-class parents also closely supervised what their children did and frequently sought their children's input on day-to-day affairs. They expected their children to negotiate with them.

Working-class parents wanted their children to succeed, too, but they were more likely to believe that child development is spontaneous, so they took a more hands-off approach to parenting. The result was that children in working-class households had a lot of unstructured time. Mostly they watched television or hung out with friends. In addition, working-class parents spoke less frequently to their children than did middle-class parents, and instead of negotiating with their children, working-class parents almost always expected their children to obey them without question.

New research shows that middle-class parents also expect their children to interact with their teacher differently than do working-class parents (Calarco, 2018). Middle-class parents coach their children to seek out the teacher for individualized support on a regular basis. Doing so helps middle-class children come up with the right answers and shows them their teachers are invested in their success. On the other hand, working-class parents adopt a no-excuses approach. If their child isn't doing well in school, working-class parents believe it is because their child isn't trying hard enough. Far from encouraging their children to seek help, working-class parents instructed their children to avoid being a nuisance in the classroom. Efforts to solve problems without teacher assistance almost always lead to frustration and discouragement among children of working-class parents. No wonder middle-class children tend to perform better in school than do working-class children.

Critical Thinking Questions

1. School councils, which are mostly made up of parents, exist across Canada. Their purpose is to assist, communicate, and provide advice to the school. How might school councils contribute to the reproduction of social class differences, both within and across schools?
2. In what ways might living in a socioeconomically deprived neighbourhood magnify the effects of growing up in a poor household?

is only through growing familiarity with their child's temperament and needs that parents learn which parenting strategies work. When a second child is born, parents must learn again. Some tasks may be easier the second time around, but because each child is different, parents often invest as much time getting to know their newborn child as they did for their first child. With only so many hours in a day, parents typically change how they interact with their older children when a new sibling enters the household—they spend less time with them but expect more from them (Strohschein et al., 2008). The lesson here is that because no two children are alike and every family has changing needs, the child socialization process is not the same for each child in the household, nor is it the same for any one child over time.

Note too that the socialization function of the family was more pronounced a century ago, partly because adult family members were more readily available for child care than they are today. As industry grew, families left farming for city work in factories and offices. Especially after the 1950s, many women had to work outside the home for a wage to maintain an adequate standard of living for their families. Fathers partially compensated by spending more time with their children.

As divorce rates began to rise, family life underwent another massive shift. Today, families are less stable and more complex than they were even a few decades ago (Tach, 2015; see Chapter 10, Families). As Canadian children spend less of their childhood living in a household with both of their parents, contact with fathers in particular has dwindled. Because of these developments, child care—and therefore child socialization—has become a big social problem.

SCHOOLS: FUNCTIONS AND CONFLICTS

For children over the age of five, the child-care problem was partly resolved by the growth of the public school system, which was increasingly responsible for **secondary socialization**, or socialization outside the family after childhood. In 2016, 86 percent of working-age Canadians had completed high school, and 65 percent had postsecondary qualifications (Statistics Canada, 2017). Canadians are among the most highly educated people in the world.

Instructing students in academic and vocational subjects is just one part of the school's job. In addition, a **hidden curriculum** teaches students what will be expected of them in the larger society once they graduate. It teaches them how to be conventionally good citizens.

What is the content of the hidden curriculum? In the family, children tend to be evaluated on the basis of personal and emotional criteria. As students, however, they are led to believe that they are evaluated solely on the basis of their performance on impersonal tests. They are told that similar criteria will be used to evaluate them in the work world. The lesson is only partly true. As you will learn in the following chapters, it is not just performance but also class, gender, sexual orientation, and racial criteria that help determine success in school and in the work world. But the accuracy of the lesson is not the issue here. The important point is that the hidden curriculum has done its job if it convinces students that they are judged on the basis of performance alone. Similarly, a successful hidden curriculum teaches students punctuality, respect for authority, the importance of competition in leading to excellent performance, and other conformist behaviours and beliefs that are expected of good citizens, conventionally defined.

SYMBOLIC INTERACTIONISM AND THE SELF-FULFILLING PROPHECY

The hidden curriculum applies to all students. However, some working-class and minority-group children reject it. They learn from their own experience and the experience of their parents that, because they have limited resources and face discrimination, they are less likely than middle-class and wealthy students are to achieve much, even if they play by the rules of the hidden curriculum. They may therefore disrespect authority, perform poorly academically, or drop out. Such actions ensure that they will experience limited upward mobility and economic success.

Early in the twentieth century, symbolic interactionists proposed the **Thomas theorem**, which describes the plight of many working-class and minority-group students. The Thomas theorem holds that "situations we define as real become real in their consequences" (Thomas, 1966 [1931]: 301). Symbolic interactionists also developed the closely related idea of the **self-fulfilling prophecy**, an expectation that helps to cause what it predicts.

Self-fulfilling prophecies can affect teachers as well. In one famous study, researchers informed teachers in a primary school that they were going to administer a special test to the pupils to predict intellectual "blooming." In fact, the test was just a standard IQ test. After the test, they told teachers which students they could expect to become high achievers and which they could expect to become low achievers. In fact, the researchers randomly assigned pupils to the two groups. At the end of the year, the researchers repeated the IQ test. They found that the students singled out as high achievers scored significantly higher than those singled out as low achievers. Since the only difference between the two groups of students was that teachers expected one group to do well and the other to do poorly, the researchers concluded that teachers' expectations alone influenced students' performance (Rosenthal and Jacobson, 1968). The clear implication of this research is that if a teacher believes that poor children or children from

Learning disciplined work habits is an important part of the socialization that takes place in schools.
SOURCE: Photos.com.

minority groups are likely to do poorly in school, chances are they will. Subsequent research bears out this finding (Becker, 2013; Rubie-Davis, Hattie, and Hamilton, 2006).

PEER GROUPS

Like schools, **peer groups** are agents of socialization whose importance grew in the twentieth century. Peer groups consist of people who are not necessarily friends but who are about the same age and of similar status. (**Status** refers to a recognized social position that a person can occupy.) Peer groups help children and adolescents separate from their families and develop independent sources of identity. They are especially influential over such lifestyle issues as appearance, social activities, and dating. In fact, from middle childhood through adolescence, the peer group is often a dominant socializing agent.

As you have probably learned from experience, conflict often erupts between the values promoted by the family and those promoted by the adolescent peer group. Adolescent peer groups are controlled by youth, and through them young people begin to develop their own identities. They do this by rejecting some parental values, experimenting with new elements of culture, and engaging in various forms of rebellious behaviour. In contrast, families are controlled by parents. They represent the values of childhood. Under these circumstances, such issues as hair and dress styles; music; curfews; tobacco, drug, and alcohol use; and political views are likely to become points of conflict between the generations.

We should not, however, overstate the significance of adolescent–parent conflict. For one thing, the conflict is usually temporary. Once adolescents mature, their families exert a more enduring influence on many important issues. Research shows that families have more influence than peer groups do on the educational aspirations and the political, social, and religious preferences of adolescents and university students (Crosnoe and Johnson, 2011).

A second reason not to exaggerate the extent of adolescent–parent discord is that peer groups are not just sources of conflict. They also help *integrate* young people into the larger society. A study of preadolescent children in a small North American city illustrates the point. Over eight years, sociologists Patricia

and Peter Adler conducted in-depth interviews with school children between the ages of 8 and 11. They lived in a well-to-do community comprising about 80 000 whites and 10 000 racial-minority group members (Adler and Adler, 1998).

In each school they visited, they found a system of cliques arranged in a strict hierarchy, much like the arrangement of classes and racial groups in adult society. In schools with a substantial number of visible-minority students, cliques were divided by race. Visible minority cliques were usually less popular than white cliques were. In all schools, the most popular boys were highly successful in competitive and aggressive, achievement-oriented activities, especially athletics. The most popular girls came from well-to-do and permissive families. One of the main bases of their popularity was that they had the means and the opportunity to participate in the most interesting social activities, ranging from skiing to late-night parties. Physical attractiveness was also an important basis of girls' popularity. Thus, elementary-school peer groups prepared these youngsters for the class and racial inequalities of the adult world and the gender-specific criteria that would often be used to evaluate them as adults, such as competitiveness in the case of boys and physical attractiveness in the case of girls. What we learn from this research is that peer groups function not only to help adolescents form an independent identity by separating them from their families, but also to teach them how to adapt to the ways of the larger society.

THE MASS MEDIA

Like the school and the peer group, the mass media have become increasingly important socializing agents in the twenty-first century. The mass media include television, radio, movies, videos, audio recordings, the Internet, newspapers, magazines, and books. The fastest-growing mass medium by far is the Internet, which has replaced television as the medium on which young adults spend the most amount of time on a daily basis (Jezard, 2018). Facebook is the most popular social media platform in Canada: 84 percent of online Canadian adults have an account; among those between the ages of 18 and 24, the figure is more than 95 percent (Gruzd et al., 2018).

Canadians increasingly live in a world of continuous connectivity (Turkle, 2011). There are benefits, to be sure. Parents can better keep track of their children's whereabouts. One can share pictures of a vacation with others while still on vacation. And if you've ever wondered what song was playing on the mall audio system, an app will identify it after just a few phrases and send you to a website where you can buy it. However, researchers wonder whether continuous connectivity comes at a cost. What does it mean that there is almost no possibility of being truly alone or unavailable? How does one take back a comment or a picture that was posted in haste but that can be seen immediately by others and reposted many times over?

THE MASS MEDIA AND FEMINIST APPROACHES TO SOCIALIZATION

The mass media expose people to influences that shape their ideas, attitudes, expectations, values, and behaviour. This is especially true for children and adolescents. Although people are to some extent free to choose socialization influences from the mass media, they choose some influences more often than others. Specifically, they tend to choose influences that are more pervasive, fit existing cultural standards, and are made especially appealing by those who control the mass media. We can illustrate this fact by considering how feminist sociologists analyze gender roles.

A **gender role** is the set of behaviours associated with widely shared expectations about how males and females are supposed to act. Gender roles are of special interest to feminist sociologists, who claim that people are not born knowing how to express masculinity and femininity in conventional ways. Instead, say feminist sociologists, people *learn* gender roles. As noted earlier, parents may be first to help their children recognize and identify with their gender, but the mass media reinforce the lesson.

Although recent exceptions exist, most movies, popular fiction, ads, music, and video games reinforce gender stereotypes. In television commercials, women are typically seen cleaning house, taking care of children, making meals, and modelling clothes. Men are not (Matthes, Prieler, and Adam, 2016). The situation is more mixed when it comes to the portrayal of women in movies. There has been a small increase in the proportion of lead characters who are female over the past two decades; however, men still account for two-thirds of all lead characters in film (Neville and Anastasio, 2019). Moreover, even though female characters today are less likely than in the past to be depicted as submissive, researchers have identified a disturbing trend in which female leads are

increasingly portrayed as both sexualized and violent (Ghaznavi, Grasso, and Taylor, 2017).

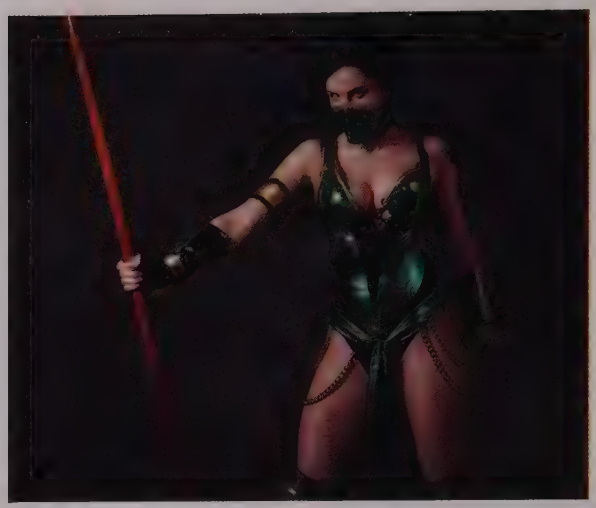
A similar pattern appears to be underway in gamer culture. Male characters heavily populate the video game world, and female characters, if and when present, are sexualized. Take the example of Mileena, Skarlet, and Jade, who are some of the female warriors in *Mortal Kombat*. They may wield ferocious weaponry, but their scantily clothed bodies and exaggerated female form suggest they have been designed for aesthetic purposes. In contrast, the male warriors of *Mortal Kombat*, with their extreme musculature and (mostly) sturdy clothing, are consistently presented as battle-ready.

It would be a mistake, however, to think that people passively accept messages about appropriate gender roles. Media messages can be interpreted in unique ways; sometimes, they are resisted. For example, *GamerGirls* is one of a growing number of **virtual communities** created by female gamers to offer support to one another. Unfortunately, their presence in gaming culture has been met with opposition and downright hostility from some males who think females don't belong. Intimidation and harassment, even threats of rape and death, are frequently directed at female gamers (Condis, 2018; Paaßen, Morgenroth, and Stratemeyer, 2017). These vicious acts are buoyed by the belief that women who violate expected gender roles deserve such treatment. Nonetheless, the ranks of female gamers are growing. Will female gamers be forever marginalized in male-dominant gaming culture? Time will tell. What is clear is the extent to which ingrained stereotypes about gender roles drive human behaviour.

As the learning of gender roles through the mass media suggests, not all media influences are created equal. We may be free to choose which media messages influence us, but most people are inclined to choose the messages that are most widespread, most closely aligned with existing cultural standards, and made most enticing by the mass media. In the case of gender roles, these messages usually support conventional expectations about how males and females are supposed to act.

RESOCIALIZATION AND TOTAL INSTITUTIONS

In concluding our discussion of socialization agents, we must underline the importance of **resocialization** in contributing to the lifelong process of social learning. Resocialization takes place when powerful socializing agents deliberately cause rapid change in people's values, roles, and self-conception, sometimes against their will.



Does Jade of *Mortal Kombat* look ready for battle or something else? Her pose, skimpy clothing, and curvaceous body are typical of female characters in video gaming culture.
SOURCE: © Draw05/Shutterstock.

You can see resocialization at work in the ceremonies that are staged when someone joins a fraternity, a sorority, a sports team, or a religious order. Such a ceremony, or **initiation rite**, signifies the transition of the individual from one group to another and is meant to ensure his or her loyalty to the new group. Initiation rites require new recruits to abandon old self-perceptions and assume new identities. Typically, they comprise a three-stage ceremony involving (1) separation from the old status and identity (ritual rejection); (2) degradation, disorientation, and stress (ritual death); and (3) acceptance of the new group culture and status (ritual rebirth).

Much resocialization takes place in what Erving Goffman (1961) called **total institutions**. Total institutions are settings in which people are isolated from the larger society and under the strict control and constant supervision of a specialized staff. Asylums and prisons are examples of total institutions. Because of the "pressure cooker" atmosphere in such institutions, resocialization in total institutions is often rapid and thorough, even in the absence of initiation rites.

A famous failed experiment illustrates the immense resocializing capacity of total institutions (Haney, Banks, and Zimbardo, 1973; Konnikova, 2018; Zimbardo, 2008). In the early 1970s, a group of researchers created their own mock prison in

what is known as the Stanford prison experiment. They paid about two dozen male volunteers to act as guards and inmates. The volunteers were mature, emotionally stable, intelligent university students from middle-class homes in the United States and Canada. None had a criminal record. By the flip of a coin, half the volunteers were designated prisoners, the other half guards. The guards made up their own rules for maintaining law and order in the mock prison. The prisoners were picked up by city police officers in a squad car, searched, handcuffed, fingerprinted, booked at the police station, and taken blindfolded to the mock prison. At the mock prison, each prisoner was stripped, deloused, put into a uniform, given a number, and placed in a cell with two other inmates.

To better understand what it means to be a prisoner or a prison guard, the researchers wanted to observe and record social interaction in the mock prison for two weeks. However, they were forced to end the experiment abruptly after only six days because what they witnessed frightened them. In less than a week, the prisoners and prison guards could no longer tell the difference between the roles they were playing and their "real" selves. Much of the socialization these young men had undergone over a period of about 20 years was quickly suspended.

About a third of the guards began to treat the prisoners like despicable animals, taking pleasure in cruelty. Even the guards who were regarded by the prisoners as tough but fair stopped short of interfering in the tyrannical and arbitrary use of power by the most sadistic guards.

All of the prisoners became servile and dehumanized, thinking only about survival, escape, and their growing hatred of the guards. Had they been thinking as university students, they could have walked out of the experiment at any time. Some of the prisoners did, in fact, beg for parole. However, by the fifth day of the experiment they were so programmed to think of themselves as prisoners that they returned docilely to their cells when their request for parole was denied.

A particularly shameful example of how total institutions function can be found in the experience of Canadian Indigenous peoples in residential schools. From the 1870s to 1996, the Canadian government snatched about 150 000 Indigenous children from their families and placed them in residential schools. The primary purpose of the residential school system was to isolate children from the influence of their families, communities, and traditions so that they could be assimilated into the dominant European culture. Such actions were sustained by the unwavering belief of European settlers that Indigenous cultures and spiritual beliefs were inferior and unequal.

In the residential school system, Indigenous children were forced to abandon their cultural practices. Harsh punishments, including beatings and the withholding of food, were meted out to children who attempted to communicate in their own language or follow their own customs. Children who ran away were tracked down and brought back to school. Their only option was to adopt European ways. As a result of resocialization, many Indigenous children came to believe that their culture was inferior. Any reminder of their heritage and who they were often elicited feelings of shame and self-loathing.

The effects of the residential school system are still with us because the institution failed to equip Indigenous children to successfully take on adult roles in the outside world. Without proper role models, Indigenous children who left the school as young adults had no concept of what it meant to be a parent. Not surprisingly, many resorted to what they knew, neglecting and abusing their children in ways that mimicked what had happened to them in the school system. Such patterns, repeated across the generations, have made entire communities vulnerable to devastating social problems. High rates of substance abuse, depression, violence, and suicide in Indigenous communities today are just some of the ripple effects caused by the residential school system.

Aimed at redressing the legacy of residential schools, the Truth and Reconciliation Commission (TRC) embarked on a six-year journey to hear the

The message on the blackboard of this Anglican-run school in Lac la Ronge, Saskatchewan, in 1945, is "Thou Shalt Not Tell Lies."
SOURCE: Library and Archives Canada, PA-134110.

stories of Indigenous survivors of residential schools and their families. The findings of the Truth and Reconciliation Commission (2015) culminated in 94 policy recommendations. The document lays out a framework for assessing whether there is measurable progress toward reconciliation, raising hopes for a better future for Canada's Indigenous people.

TIME FOR REVIEW

1. What is the role of children in their own socialization?
2. How does the hidden curriculum influence successful school performance?
3. What messages do the mass media send about appropriate roles for men and women?
4. Why are total institutions ideal for resocialization?

SOCIALIZATION AND THE FLEXIBLE SELF

The development of the self is a lifelong process. When young adults enter a profession or get married, they must learn new occupational and family roles. Retirement and old age present an entirely new set of challenges. Giving up a job, seeing children leave home and start their own families, and losing a spouse and close friends—all of these changes later in life require that people think of themselves in new ways and redefine who they are.

Many new roles are predictable. To help us learn them, we often engage in **anticipatory socialization**, which involves beginning to take on the norms and behaviours of the roles to which we aspire. Other new roles are unpredictable. You might unexpectedly fall in love and marry someone from a different ethnic, racial, or religious group. You might experience a sudden and difficult transition from peace to war. If so, you will have to learn new roles and adopt new cultural values or at least modify old ones. Even in adulthood, then, the self remains flexible.

Today, people's identities change faster, more often, and more completely than they did just a few decades ago. One factor contributing to the growing flexibility of the self is globalization. As we saw in Chapter 3, Culture, people are now less obliged to accept the culture into which they are born. Because of globalization, they are freer to combine elements of culture from a wide variety of historical periods and geographical settings.

A second factor increasing our freedom to design our selves is our growing ability to fashion new bodies from old. People have always defined themselves partly in terms of their bodies—your self-conception is influenced by whether you're a man or a woman, tall or short, healthy or ill, conventionally attractive or plain. However, our bodies used to be fixed by nature. People could do nothing to change the fact that they were born with certain features and grew older at a certain rate.

Now, however, you can change your body and, therefore, your self-conception, radically and virtually at will—if, that is, you can afford it. Bodybuilding, aerobic exercise, and weight reduction regimens are more popular than ever. Plastic surgery allows people to buy new breasts, noses, lips, eyelids, and hair—and to remove unwanted fat and hair from various parts of their bodies. Other body-altering procedures include sex-change operations and organ transplants. At any given time, more than 50 000 North Americans are waiting for a replacement organ. Brisk, illegal international trade in human hearts, lungs, kidneys, livers, and eyes enables well-to-do people to enhance and extend their lives (Columb, 2017).

Modern bionics makes it possible to wire realistic prosthetic limbs into brain circuitry that, with practice, can function almost like the original limbs. Technologies are also being developed that can restore vision and hearing using cameras, microphones, and microscopic electrodes. As these examples illustrate, many opportunities for changing our bodies, and therefore our self-conception, have been introduced in recent decades.

SELF-IDENTITY AND THE INTERNET

Further complicating the process of identity formation today is the growth of the Internet. In the 1980s and early 1990s, most observers believed that social interaction by means of computer would involve only the exchange of information between individuals. They were wrong. Computer-assisted social interaction can profoundly affect how people think of themselves.

Internet users interact socially by exchanging text, images, and sound via email, instant messaging, smartphone, Facebook, Twitter, videoconferencing, computer-assisted work groups, online dating services, and so on. Growing use of the Internet implies that the self has become increasingly flexible and people are freer than ever to shape their selves as they choose. But, as Cooley's notion of the looking-glass self suggests, what we share online is not a

one-way flow of information. Our audience, who could be our closest friends and family but might be a complete stranger living far away, is continually observing and evaluating what we share. Audience feedback has the power to shape how we think, act, and see ourselves, which in turn, influences how we subsequently choose to present ourselves (Rettberg, 2017). Consider, too, your decision when Facebook asks if you want to share the *Year in Review* algorithm-generated video it has created for you (and that cannot be edited). Should we welcome or be concerned by the efforts of social networking sites to govern how others see you (Cheney-Lippold, 2017; Gillespie, 2018)?

TIME FOR REVIEW

1. In what sense is the self flexible?
2. How have globalization, various medical advances, and the pervasiveness of the Internet produced more flexible selves?

SUMMARY

1. **Why is social interaction necessary to unleash human potential?**
   Studies show that children raised in extreme isolation do not develop normally. They often lack the intellectual and emotional capacity of children raised in normal environments. Various theories suggest that socialization leads to the formation of self. Freud argued that a self-image begins to emerge when a baby's impulsive demands are denied. Because of many lessons in self-control, a child eventually develops a sense of what constitutes appropriate behaviour, a moral sense of right and wrong, and a personal conscience. Ongoing social interaction is necessary for the self to emerge.

   Like Freud, Mead noted that an impulsive aspect of the self (the "I") is present from birth. Developing Cooley's idea of the "looking-glass self," Mead also argued that a repository of culturally approved standards emerges as part of the self during social interaction. Mead drew attention to the unique human capacity to take the role of the other as the source of the "me." People develop, he wrote, by first imitating and pretending to be their significant others, then learning to play complex games that require understanding several roles simultaneously, and finally developing a sense of cultural standards and how they apply.

2. **How are stages in the life course influenced by the historical period in which people live?**
   The stages of the life course have been structured differently across history. For example, in the past, childhood and adolescence were not recognized as distinct life stages, with the consequence that children were expected to live in much the same way that adults did. Accordingly, children would start working as soon as they were able to perform work tasks. A new view of childhood, which emerged more than two centuries ago, began to treat children as unsocialized people who needed instruction and training to develop properly. In response, school attendance became mandatory and labour laws prohibited children from working in the paid labour force. In each historical period then, we can see that socialization prepares individuals to become the people society needs them to be.

3. **In what ways has the socializing influence of the family decreased, while the influence of schools, peer groups, and the mass media has increased?**
   Families remain an important and enduring agent of socialization. However, their influence has decreased as the reach of other institutions and social forces has grown. The transfer of knowledge and skills that, in the past, would have been the primary if not sole responsibility of families increasingly occurs outside the family. As a result, what parents teach their children may be offset by what the children learn in other settings. For example, sex education in the curriculum in Canadian schools may reflect values that conflict with what children learn in the home. Similarly, peers and the mass media may introduce children to perspectives that differ from what they are typically exposed to through their families.

4. **In what sense is the self more flexible than it used to be?**
   People's self-conceptions are subject to more flux now than they were even a few decades ago. Cultural globalization, medical advances, and computer-assisted communication are among the factors that have made the self more flexible.

QUESTIONS TO CONSIDER

1. Consider the significant people in your life. Have they always been important to you? How have they shaped and influenced your sense of self?
2. Prisons are socialization institutions organized to rehabilitate or "correct" deviant behaviour. How effective are these institutions and why are they not more successful in meeting their goals?
3. What is the self that you project to the world when you use social media (e.g., Facebook, Twitter, Pinterest, Snapchat)? Does this self differ from how your significant others see you? To what extent might participation in these virtual communities exert an influence on your relationships with your significant others?

GLOSSARY

Adaptation (p. 90) is the process of arranging one's actions to maximize the degree to which an environment satisfies one's needs and interests.

An **age cohort** (p. 85) is a category of people born in the same range of years.

Age roles (p. 85) are norms and expectations about the behaviour of people in different age cohorts.

Anticipatory socialization (p. 98) involves taking on the norms and behaviours of the role to which we aspire.

A **gender role** (p. 95) is the set of behaviours associated with widely shared expectations about how males and females are supposed to act.

The **generalized other** (p. 82), according to Mead, is a person's image of cultural standards and how they apply to him or her.

A **generation** (p. 86) is an age cohort that shares unique formative experiences during the first few decades of life, which help to shape a collective identity and set of values.

The **hidden curriculum** (p. 93) in school involves teaching obedience to authority and conformity to cultural norms.

The **I** (p. 81) is the subjective and impulsive aspect of the self that is present from birth, according to Mead.

An **initiation rite** (p. 96) is a ritual that signifies a person's transition from one group to another and helps ensure his or her loyalty to the new group.

The **life course** (p. 83) refers to the distinct phases of life through which people pass. These stages vary from one society and historical period to another.

The **me** (p. 81) is the objective component of the self that emerges as people communicate symbolically and learn to take the role of the other, according to Mead.

A person's **peer group** (p. 94) comprises people who are about the same age and of similar status as the individual. The peer group acts as an agent of socialization.

Primary socialization (p. 90) is the process of acquiring the basic skills needed to function in society during childhood. Primary socialization usually takes place in a family.

Resocialization (p. 96) occurs when powerful socializing agents deliberately cause rapid change in a person's values, roles, and self-conception, sometimes against a person's will.

Rites of passage (p. 83) are cultural ceremonies that mark the transition from one stage of life to another (e.g., baptisms, confirmations, weddings) or from life to death (funerals).

A **role** (p. 80) is the behaviour expected of a person occupying a particular position in society.

Secondary socialization (p. 93) is socialization outside the family after childhood.

The **self** (p. 81) consists of your ideas and attitudes about who you are.

A **self-fulfilling prophecy** (p. 93) is an expectation that helps bring about what it predicts.

Significant others (p. 82) are people who play important roles in the early socialization experiences of children.

The **social environment** (p. 90) is composed of the real or imagined others to whom individuals must adapt to satisfy their own needs and interests.

Socialization (p. 80) is the process by which people learn to function in their own culture.

Status (p. 94) refers to a recognized social position that a person can occupy.

The **Thomas theorem** (p. 93) states, "Situations we define as real become real in their consequences."

Total institutions (p. 96) are settings in which people are isolated from the larger society and under the strict control and constant supervision of a specialized staff.

A **virtual community** (p. 96) is an association of people, scattered across the country, continent, or planet, who communicate via computer about a subject of common interest.

CHAPTER 5

GENDERS AND SEXUALITIES

Marisa Young and Tina Fetner McMASTER UNIVERSITY

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Understand the difference between sex, gender, and sexuality.
- Explain informal processes that promote inequalities in paid and unpaid work for gender and sexual minorities.
- Analyze the consequences of inequalities for gender and sexual minorities in terms of work and family.
- Describe how the intersection of gender and sexuality with other minority characteristics, including ethnicity, indigeneity, race, and class, make some people more vulnerable to inequalities than others.
- Outline and contrast a variety of sociological explanations for inequalities in gender and sexuality in work and family experiences.
- Appreciate that we can achieve a higher level of equality by implementing certain policy initiatives and challenging persistent ideas about appropriate roles for women, men, and members of the LGBTQ community.

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INTRODUCTION

A fancy white wedding is something that many girls dreams of. Wearing the perfect dress, arranging the decorations, and taking a beautiful photo of the bridesmaids and groomsmen are all part of the package. Weddings are more than just a celebration of a lifelong commitment to a romantic partner. They are part of the story we tell to make sense of who we are and what we value. Our cultural ideal of a white wedding also tells us a lot about how we see gender and sexuality. It tells us what girls *should* dream of, and how that might be different from what boys dream of. Our vision of a white wedding is centred on a lifelong romance between a man and a woman.

As lesbian, gay, bisexual, transgender, and queer—or LGBTQ—people become more visible in our culture, this dream of a white wedding begins to seem narrowly devoted to heterosexuality. What about same-sex couples? Do they also dream of a white wedding with a big dress, a three-tiered cake, and a walk down the aisle accompanied by a proud father? And while we are asking, what about those straight couples? Do all straight girls really spend their childhood dreaming about a white wedding, or do some girls think it's not that important in their lives?

A few years after same-sex marriage was legalized in Canada, we asked recently married women about their weddings (Fetner and Heath, 2016). We wanted to know how universal the fairy-tale dream of the white wedding was, and whether lesbian women were critical of this traditional vision. We interviewed dozens of newlyweds and found that the dream of a white wedding was not as universal as the stories we tell ourselves might suggest.

Many lesbian women worried that by adopting some of the trappings of traditional weddings, they might send a message—to their spouse or to their friends and family—that they are embracing marriage as a patriarchal institution. Many lesbian brides would rather communicate that they are entering marriage on their own terms, changing the institution. We heard stories of lesbian women who both walked down the aisle together, of backyard potlucks where homemade dishes were brought in and cakes were baked by friends. And we heard from women who were married in their neighbourhood pub, surrounded by friends.

When we talked to straight women, many said that they indeed had been dreaming of a white wedding all their lives. They were able to use their wedding day to enact a fantasy of the perfect moment—making a commitment to the love of their life. These women did not worry at all about marriage being patriarchal like their lesbian counterparts did. Rather, they found the perfect dress, put on a lavish party for many relatives and friends, and gladly took their husband's surname. However, some straight women did not agree that a big, white wedding was right for them. They didn't want the attention a big party would draw, they didn't want their friends to feel obliged to buy them gifts, and they didn't want to spend more money than they could afford.

One of the things that our research on weddings revealed is that the stories we tell ourselves about what every little girl supposedly dreams of often masks a more complicated reality in which different girls want different things. This doesn't mean that the stories themselves are not important. Indeed, they are key to our understanding of the way our reality is shaped by cultural stories of gender and sexuality. Many times, these stories tell us about which versions of gender and sexuality are culturally valued and "normal." They tell us something important about the society we live in.

In this chapter, we discuss how some expectations and evaluations of gender and sexuality influence men's and women's experiences, particularly in the worlds of work and the family. We set the foundation for this chapter by outlining key definitions and perspectives on gender and sexuality, and then discuss important inequalities in paid work and domestic obligations.

SEX, GENDER, AND SEXUALITY

DEFINING SEX AND GENDER

What's the first thing you think of when you hear the term *gender differences*? Do you think of the physical distinctions between men and women? Or do you think about differences in the way men and women tend to behave? Such differences are important, but they are associated with one's **gender** rather than one's **sex** at birth, and neither gender nor sex at birth is as simple as you might think.

Sex at birth is assigned by healthcare professionals who assist with labour and delivery, who are bureaucratically tasked with recording a baby's sex in official records. To determine sex, they look for distinct male or female genitalia, which are assumed

to represent male or female reproductive systems as well as differences in hormone levels. Sex is therefore assumed to be *biologically* based. We often use the terms "male" and "female" to distinguish sexes. However, some people are born with bodies that do not conform to this binary understanding of sex. The term *intersex* refers to any number of conditions that place bodies in the space somewhere between male and female, such as hormonal or chromosomal conditions, reproductive system anomalies, or variations in external genitalia (Davis, 2015). As we discuss later, some sociologists believe that sex is "socially constructed"—a term we will unpack later.

One's sex at birth can be distinguished from one's gender, which is *socially* based. Gender can be understood as the set of social expectations for how men and women are supposed to behave according to cultural standards—the system of rules that tell us about masculinity and femininity. Consider for a moment the types of behaviours that you would define as masculine or feminine: Is playing contact sports more masculine or feminine? What about wearing makeup? Painting one's fingernails? Driving a pickup truck? These behaviours can be adopted by men or women, but our culture has associated each with a particular gender, and these associations affect how many men and women act. **Gender norms** vary over time and place (Connell, 2005). For example, they changed in the twentieth century when women resisted restrictive gender roles and demanded the right to vote, access to paid work, and other aspects of equality.

From the individual's perspective, gender comprises the feelings, attitudes, and behaviours associated with being male or female. When we talk of gender, we are often referring to the performance of masculine and feminine traits. Yet some people who were assigned the male sex at birth may prefer some feminine behaviours, such as wearing women's clothing. Identification with, or a sense of belonging to a particular sex—biologically, psychologically, and socially—is known as **gender identity**. People whose experience of their gender matches their assigned sex at birth are **cisgender**. People whose gender identity is not consistent with their assigned sex at birth are understood to be **transgender**, often shortened to **trans** (Westbrook, 2016).

Furthermore, we can think beyond binary categories of "men/women" or "cis/trans." For example, some people adopt a nonbinary gender identity or consider themselves genderqueer or agender. These nonbinary identities remind us that, despite gender norms, a person may perform a range of behaviours, some of which are generally considered masculine and others feminine. In addition, gender identity is characterized by a certain degree of fluidity. That is, it may shift over time and from one context to another.

SEXUALITIES AND SEXUAL IDENTITY

Sexuality is a complex topic that refers to individuals' sexual desires, behaviours, and identities. The system of socially constructed identity categories for sexuality are defined through traditional, binary gender categories. As a result, early psychological theories of sexuality defined those who are sexually attracted to the so-called opposite sex as **heterosexual**, and those who are sexually attracted to the same sex as **homosexual**. The idea that such attractions comprised a fundamental **sexual orientation**, rather than a changeable desire or behaviour, became popularized by psychologists who were interested in distinguishing "normal" sexuality from what they considered abnormal and unhealthy. Before the 1970s, homosexuality was widely considered a mental illness, a decision that psychiatrists and psychologists later understood to be incorrect (Seidman 2010).

New terms for **sexual identity** categories were embraced. For example, *straight*, *gay*, *lesbian*, and *bisexual* are common sexual identity terms used today. However, some people reject defining their sexual identity through the gender of their partner, and they might use the term *queer* to describe either their sexual or gender identity. Similarly, some people prefer the term *pansexual* to bisexual to avoid describing their sexual identity through a gender lens. Some people who feel little or no sexual desire at all adopt an *asexual* identity. In some Indigenous cultures, the *two-spirit* identity captures aspects of gender and sexuality.

In all these cases, sexual identities are socially constructed categories that represent not only one's personal feelings of sexual desire but also form an important aspect of the social order. As discussed later, gender and sexual identities are associated with social inequalities. **Heteronormativity** denotes the social processes that value traditional norms of gender and sexuality and reward those who conform to social expectations.

Counter-normative identity categories can help people explain themselves to others and find appropriate sexual partners, but they also can be experienced as constraining and uncomfortable. These sexual

identities become institutionalized, for example, when neighbourhoods develop around LGBTQ subcultures (Ghaziani, 2014). (We use the acronym LGBTQ throughout the text to refer to all sexual minorities, not just those who identify as lesbian, gay, bisexual, transgender, or queer.) However, just as gender is more complex than its traditional binary definition, the bounds of sexuality are broader than categorical sexual identity labels. It is more appropriate to think about sexuality as encompassing a complex mix of desire, behaviour, and identity (Michael et al., 1994: 174–79). We follow this line of thought when discussing inequalities in individuals' opportunities and experiences today.

UNDERSTANDING GENDER AND SEXUALITY

ESSENTIALISM VS. SOCIOLOGICAL VIEWS

Many theories try to explain differences in gender and sexuality. Most take one of two perspectives. The first assumes that differences in gender and sexuality reflect a natural, progressive evolution (this is the *essentialist* perspective). Others see these differences as a product of the various social positions occupied by women and men (this is the *social constructionist* perspective).

Essentialists assume that male–female differences in sexual scripts, the division of labour between paid and domestic work, sexual attraction, emotional dispositions, and social, physical, and sexual behaviour are natural and universal. From their point of view, the key factor shaping gender and sexuality differences is the reproductive anatomy of men and women: women's ability (and men's inability) to have children shapes the social positions they occupy and the experiences and inequalities that follow. Further, essentialists tend to define sexuality as innate and static throughout life. This perspective is deterministic, suggesting that one's sex at birth determines one's gender, masculine and feminine traits, and sexual identity. The fundamental claim of essentialism is that biological and/or psychological differences define social behaviours, desires, and practices.

There are several problems with the essentialist view. First, *essentialists ignore the historical and cultural variability of gender and sexuality.* Take for example those in Indigenous cultures who refer to themselves as two-spirited, which is a term used to describe their sexual, gender, and/or spiritual identity that means having both a masculine and feminine spirit. While this term refers to the most common understanding of two-spirit, different Indigenous communities have different traditions related to two-spiritedness. For example, in Lakota culture, being two-spirit refers to fulfilling roles traditionally meant for the opposite gender, while in Mi'kmaq culture it refers to being attracted to the same gender (Dalla Lana School of Public Health, 2018).

Second, *essentialists ignore how the environment can influence individuals' physical and psychological traits overtime.* Much research shows that women are developing traits traditionally viewed as masculine and, to a lesser degree, men are adopting traits traditionally viewed as feminine. For example, women have on average become more assertive, aggressive, and physically stronger since the 1970s. More men express emotions and feelings compared than in the past (Badura et al., 2018; Twenge, 1997). As we discuss later, men's and women's roles in the workplace and at home are also changing. Men are spending more time doing child care and women more time doing paid work (Marshall, 2011).

Finally, *essentialists ignore the role of social structure and individual relations in influencing differences in gender and sexuality.* As we discuss below, men and women are afforded distinct opportunities in paid and unpaid (domestic) work, and each are rewarded differently for their efforts. Essentialists ignore the role society plays in shaping these differences. One's sexuality and sexual orientation are also influenced by social structures and interactions. For example, the historical record reveals that some people have felt sexual attraction to others of their own sex in all places and times (Greenberg, 1988). However, the idea that same-sex attraction constitutes a defining identity is of recent vintage, dating from the 1860s, when the term "homosexual" made its first appearance. The invention of LGBTQ identity categories has made possible the development of subcultures, neighbourhoods, and other social institutions that support LGBTQ people (see the Critical Sociology feature, Trans Women of Colour Spark the Modern LGBTQ Movement).

Social constructionism is the main alternative to essentialism. Social constructionists argue that differences in sex, gender, and sexuality are not the product of biological properties but of social structure and culture. *Culture* is composed of shared systems of meaning. It incorporates people's values and beliefs. Cultural differences influence the meaning

Critical Sociology

TRANS WOMEN OF COLOUR SPARK THE MODERN LGBTQ MOVEMENT

In the 1960s, social movements of all kinds demanded social change throughout North America. Quebec nationalists demanded sovereignty. Indigenous North Americans struggled for "Red Power." The civil rights movement demanded equality for blacks. The women's movement fought for equal gender rights. Anti-war activists protested U.S. military involvement in Vietnam. And some LGBTQ activists began to demand freedom from harassment by police.

At that time, some North American jurisdictions had laws making it illegal for men to wear women's clothes, and vice versa. It was also illegal to patronize an establishment that was known for serving homosexuals. Police routinely carried out raids of gay bars, arresting everyone inside, processing them, and often requiring them to spend the night in jail before a judge dismissed the charges. In the meantime, local newspapers would print the names and addresses of everyone arrested, causing many closeted bar patrons to lose their jobs and become estranged from their families of origin.

One group in particular stood bravely against such police harassment: trans women of colour, many of whom made a living through sex work. Activists like Sylvia Rivera and Marsha P. Johnston co-founded a social movement organization, the Street Transvestite Action Revolutionaries, or STAR, to help homeless youth in the drag community and trans women of colour support each other as they advocated for social change.

Sylvia Rivera and her radical friends were at the Stonewall Inn in New York City during a police raid and fought back. They initiated a riot against

SOURCE: © Krystyna Pawlowicz Photography/Alamy.

the police that lasted for days, as supportive members of the LGBTQ community descended on the bar to join the fight. The Stonewall riots are credited with ushering in the modern LGBTQ movement, inspiring a generation of LGBTQ activists to fight for social change. The LGBTQ Pride parades that we see annually in many North American cities were established to commemorate the Stonewall Riots.

Critical Thinking Questions

1. Why do you think that trans women activists like Sylvia Rivera and Marsha P. Johnson were prompted to resist the police raid at the Stonewall Inn?
2. To what degree have trans women of colour been included in the LGBTQ movement as it grows and changes over time? Are their interests represented in the goals of the movement today?

attributed to gender and sexuality. Behaviours associated with each can vary across time and space, depending on these meanings. We gave an example in our discussion of two-spirited people. *Social structure* refers to the way major institutions, such as families, the economy, and the political system, are organized. In North America and most of the Western world, the social structures we engage with daily are ordered by **patriarchy**—a gendered belief system that privileges men above women in matters of power and authority.

Social Constructionism and Gender Differences

In seeking to explain gender inequality and the prioritization of patriarchy above other forms of societal organization, social constructionists stress sociohistorical change.

Consider in this connection that, during the first 90 percent of human history, when people lived in nomadic tribes of no more than about 100 people, most men hunted animals and most women gathered wild, edible plants and did most of the child care. However, this gender division of labour was not associated with large differences in power and authority because women produced a large percentage of the tribe's food. Men had few privileges that women didn't also enjoy. This mode of living was largely based on heterosexuality, placing an importance on procreation (Dahlberg, 1981).

Gender differences in power and authority became significant only when people settled down and

men came to control private property. Gender differences were highly pronounced in agrarian (farming) societies and during the Industrial Revolution, which began in England in the late 1700s, spreading to continental Europe and North America in the 1800s (Goldin, 2009; Tilly, 1994).

On the family farm, there was considerable overlap between home and workplace; work was done in, around, and near the home. However, during the Industrial Revolution, mill, mine, factory, and office became separate places of work. The family now came to depend on one adult member doing paid work outside the home and the other doing domestic work in the home. Distinct gender roles became more apparent. The ideal woman was no longer seen as a hardy and productive member of the family responsible for gathering food and tending animals, but as a "feminine" creature better suited to unpaid housework and managing the social and emotional affairs of the family. In contrast, men came to be regarded as better suited to managing the rough-and-tumble, "masculine" world of paid work. A strict **gendered division of labour** was institutionalized as work tasks came to be based on sex differences (Nash and Fernandez-Kelly, 1983).

Women were not completely shut out of the public sphere. They started entering the paid labour force during the Industrial Revolution, in most cases taking jobs that men did not want, including low-paying work in domestic service and textile factories. Racial, ethnic, and class inequalities crystallized in the paid workforce, with black, low-income, and immigrant women more likely to take on paid work, and white, middle-class women more likely to be unpaid homemakers.

Women's presence in the paid workforce began to increase in the early to mid-1900s because of labour shortages during World War I and World War II. While men were off fighting, women assumed an important role in the paid workforce to help sustain the economy. When men returned from war, women were expected to return to their traditional roles in the home. Most did, but others had grown accustomed to the rewards of paid work. They sought new employment opportunities just as the nonmanual, "service" sector of the economy started to expand quickly (Pinchbeck, 1930). In Canada today, participation in the paid labour force is 74.7 percent among women and 81.8 percent among men (World Bank, 2018).

Despite near-equality in the extent to which women now participate in the paid labour force, the representation of, and income received by, men and women still vary greatly within and across occupations, as you will soon learn (Moyser, 2017). Moreover, although men now do more domestic work than they used to, women—even women who work full-time—still do considerably more domestic work than men do (Moyser, 2017; Scheibling and Young, 2019).

Doing Gender

While sociohistorical events led to a gendered social order, gender is also produced and reproduced daily in people's actions and interactions with others. From this perspective, gender is not an assigned status but something that we constantly strive to achieve. Consider the gender performance we put on daily. As a man or woman, you might do your hair or wear a certain outfit. You might wear makeup to better present your feminine side. You might laugh a certain way when interacting with others. In these and myriad other ways, you signal your gender identity to others. Others acknowledge these signals, and the interaction between you and others thus establishes and reinforces your gender identity. Said differently, gender is something people *accomplish* daily by interacting with others. Many people regard gender as "natural" but in fact it is a deeply social process, continuously negotiated while people interact with others (Gagnon and Simon, 1973; West and Zimmerman, 1987).

Social Constructionism and Sexualities

Social constructionism helps us understand differences in sexuality and sexual orientation, too. For example, norms concerning what is considered sexually acceptable and unacceptable vary over time and place. In North America in the 1950s, men and women were expected to pursue a monogamous heterosexual relationship, legalize it through marriage, and procreate only within it. In contrast, in ancient Greece it was considered acceptable for married men to have young male lovers or multiple women to satisfy their sexual desires. As these examples demonstrate, sexuality is a verb, not a trait—an act accomplished not only daily but differently in different social contexts.

Norms surrounding gender and sexuality structure inequalities faced by individuals of different genders and sexualities. One's gender status often interacts with one's class, age, race, ethnicity, indigeneity, and immigration status to influence patterns of inequality. Thus, the position and experience of a 60-year-old, white, Protestant, middle-

class lesbian born in Canada is vastly different from the position and experience of a 20-year-old, black, Muslim, working-class lesbian born and raised in Somalia and now living in Canada. **Intersectionality** refers to how various dimensions of inequality interact. The study of intersectionality emphasizes that the entire ensemble of status dimensions attached to people must be taken into account if one hopes to achieve a fully rounded understanding of how they experience the world. We adopt an intersectional perspective and, where possible, discuss the ways in which gender and sexuality interact with other statuses to influence patterns of social inequality.

Defining Social Inequality

What do sociologists mean when they talk about inequality? *Social inequality* refers to significant differences across social categories in access to valued goods, services, rights, and experiences. For purposes of analyzing inequality by gender and sexuality in the public and domestic spheres—a key part of inequality—we focus on differences in power, resources, and responsibilities.

Power is the ability to impose one's will on others despite resistance. The exercise of power influences behaviours, attitudes, and experiences, both those of the relatively powerful and those of the relatively powerless. Power is not always exercised by individuals. Groups, organizations, and institutions can impose it. However, when individuals exercise power, it derives from a person's social position. Later we discuss power in reference to inequalities in paid and unpaid work by gender and sexualities, showing, for example, how the tendency of men to enjoy more power than women in the workplace affects men's and women's experience of paid work.

Resources are valued assets that individuals draw on to help achieve their goals. Resources include money and material goods that help sustain one's self and one's family, education, the level of prestige associated with different occupations, and the work conditions that accompany some jobs. We focus on resources earned from paid work—wages, promotion opportunities, and so on.

Finally, **responsibilities** are the obligations that people are expected to meet. Examples include job demands, work hours, domestic chores, child care, and emotional support of friends and family. We discuss the different responsibilities allocated to men, women, and members of the LGBTQ community in paid and unpaid work.

Bearing our definition of social inequality in mind, we first examine legislation enacted to help equalize power, resources, and responsibilities by genders and sexualities. We then underscore that, despite these efforts, inequalities in paid and unpaid work persist.

POLICIES TO REDUCE INEQUALITY BY GENDER AND SEXUALITY

GENDER-BASED LEGISLATION

Until about a century ago, Western civilization was thoroughly dominated by men, who used laws and regulations to create systems of governance that excluded women from public life. A woman was understood to be the property of her father and then her husband. Gender inequality was produced by visible social practices that explicitly discriminated against women. The result was a patriarchal social order in which men controlled the government, the economy, and the household.

In the last century, many discriminatory laws and practices that discriminate against women have been overturned. For example, after decades of protest by feminist activists, women gained the right to vote in many countries in the first half of the twentieth century. Canada reached a milestone in 1929, when the Privy Court of England overturned a Supreme Court ruling that women were not "qualified persons" to serve in the Senate. This decision served as the basis for later rulings that women should not be excluded from legal standing. Today, the Charter of Rights and Freedoms guarantees equal treatment under the law for everyone in Canada.

Nonetheless, full equality between men and women has not been achieved, as we will see. The gender revolution has been "uneven and stalled" (England, 2010). A large gender gap in wages remains. Gender inequality in responsibility for unpaid labour persists. Gender discrimination in the workplace is still widespread. Sociologists have been grappling with this puzzle for decades: Without legal barriers to equality, why have we not achieved full gender equality? The answer is that "soft" and often unconscious social processes, such as gender stereotyping, affect our understanding of the inherent value of men and women, our ideas about who is good at a particular kind of work, and what type of

person should be promoted into positions of power (Rojas, 2017).

LGBTQ-based Legislation

Just as women's legal rights have improved, so have legal rights for LGBTQ people. Just a few decades ago, LGBTQ people were not recognized as having rights under the law. Consensual adult same-sex sexual activity was prohibited by criminal statutes. Because homosexuality was considered a mental illness, LGBTQ people could be institutionalized in mental health facilities against their will and given treatment without consent. In response, many LGBTQ people hid their identities, remaining "in the closet" rather than being open about themselves with friends, family, and co-workers.

Consensual sex between same-sex adults was decriminalized in 1969, and other laws discriminating against LGBTQ people have been overturned since then. For example, the 1982 Charter of Rights and Freedoms did not mention sexual orientation as a category for protection from discrimination. However, the courts have consistently interpreted the Charter to include protections for LGBTQ people. Since then, laws have been slowly changing to recognize the legal equal standing and full citizenship of LGBTQ people.

Despite these changes, full equality for LGBTQ people has not been achieved. For example, heterosexual married couples tend to earn more than LGBTQ couples (Waite and Denier, 2015). Surveys of LGBTQ people consistently find high rates of harassment, discrimination, violence, and threats of violence against LGBTQ people (Bauer and Scheim, 2014; Taylor et al., 2011). As in the uneven and stalled gender revolution, the substantial social change that Canada has witnessed regarding LGBTQ rights has not produced equality and full citizenship for LGBTQ people. It falls to sociologists to explain the subtle and hidden social processes through which these inequalities are reproduced. We now review of some of them.

TIME FOR REVIEW

1. What is the difference between sex, gender, and sexuality?
2. Identify the key limitations of essentialist perspectives of sex, gender, and sexuality.
3. Outline key legislative changes that have led to greater equality for the LGBTQ community.

PERSISTENT PATTERNS OF INEQUALITY BY GENDER AND SEXUALITY

PATTERNS OF INEQUALITY IN PAID WORK

People need paid work to support themselves and their family members. Paid work is associated with intrinsic rewards, such as job satisfaction, and extrinsic rewards, notably a salary or wage. Although women have made rapid strides in paid labour force participation in recent decades, they still face inequalities insofar as they are segregated in certain types of jobs that tend to pay relatively little and are often part-time or otherwise "precarious."

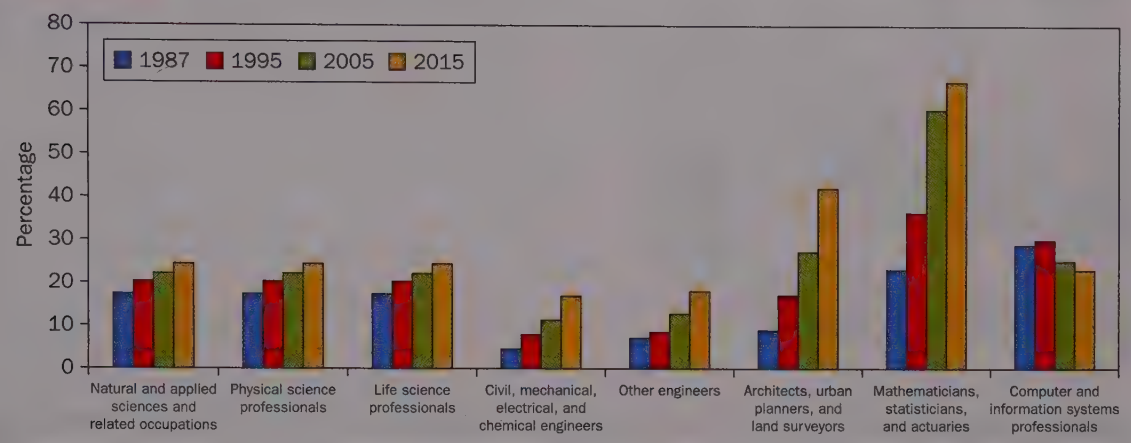
Occupational Segregation

Think about the following occupations: doctor, nurse, engineer, teacher. In which occupations are you more likely to find a man? In which are you more likely to find a woman? If you're like most people, you believe that men are more likely to be doctors and engineers, while women are more likely to be nurses and teachers. Sociologists say that men and women tend to be "horizontally and vertically segregated" across and within occupations and job sectors.

Horizontal segregation refers to an unequal gender distribution across occupations. Women are overrepresented in relatively low-paid, service occupations that require fewer educational credentials, such as clerical work and teaching. Men are overrepresented in relatively high-skill, high-paid occupations like medicine and law (Moyser, 2017). For example, in 2017, men made up 77 percent of those working in natural or applied sciences, while women made up 80 percent of those working in health occupations, largely because the overwhelming majority of nurses are women (Statistics Canada, 2017a). However, over time, these trends are changing. Figure 5.1 breaks down the representation of women across types of occupation in Canada from 1987 to 2015. In all sectors, women's representation is increasing.

Men and women in Canada's paid workforce are also vertically segregated. **Vertical segregation** refers to the domination of one gender (typically men) in positions of high authority and power in each occupation. It is difficult to compare the degree of vertical segregation between occupations because of the wide scope and variation in job titles within each occupation; job titles don't easily translate from one

FIGURE 5.1 Women's Representation by Occupation Sector, 1987–2015



SOURCE: Melissa Moyser. (2017). "Women and Paid Work." *Women in Canada: A Gender-Based Statistical Report*. Statistics Canada. Catalogue No. 89-503-X.

occupation to another (Fortin and Huberman, 2002). However, research shows that, within occupations, men generally tend to hold job titles associated with more authority, prestige, and pay (Jarman, Blackburn, and Racko, 2012).

For members of the LGBTQ community, engaging in paid work often required staying in the closet to avoid the risk of being fired. In the era of legal discrimination against sexual minorities, only a few occupations and industries became safe havens for LGBTQ people. For example, careers in the arts were more open to LGBTQ people. Working-class lesbian women were sometimes able to find factory work (Kennedy and Davis, 2014). Hairdressing became so closely associated with gay men that a stereotype developed around this role. In recent decades, sociologists have recorded a large cultural shift in the acceptance of LGBTQ people in the workplace (Dean, 2014). However, some occupations, such as school teacher, still pose serious risks for LGBTQ workers, who often find that parents and administrators still object to their being out of the closet in the classroom (Connell, 2015).

Job Resources and Rewards

Horizontal and vertical segregation have negative consequences for women's access to job resources and rewards, especially when it comes to earnings. On average, women tend to make less than men do. The **gender wage gap** is the difference between men's and women's earnings. Since 1992, the gender wage gap in Canada has hovered around 30 percent, meaning that women make only about 70 percent of men's annual earnings.

Statistics on the wage gap mask gender differences in work hours, union representation, age, and type of job—factors that might explain at least part of the noted discrepancy. For instance, women tend to work fewer hours than men do; 35.5 hours compared to 41.1 hours on average per week (Moyser, 2017). These discrepancies have led to disagreements over the extent of the gender wage gap. Some analysts report that women earn 70 cents for every dollar men earn (Blau and Kahn, 2007), while others report an 87 cent difference (Moyser, 2017) and still others claim the difference is only 10 cents (Morissette, Picot, and Lu, 2013). Setting these disputes aside, the indisputable point is that equally qualified women are often paid less for doing the same work as men. As John Oliver, television host of *Last Week Tonight*, said with reference to the gender wage gap:

> If someone takes a dump on my desk, the size of the dump is not the issue. I'm not going to say, "Well how big of a dump is it? Eight inches? Ten inches? Oh, just three inches? Well that's almost like you didn't take a dump on my desk at all" (John Oliver, *Last Week Tonight*, August 19, 2014).

The point is that it's not just the size of the gender wage gap that matters, but the fact that an unjustifiable difference in men's and women's wages exists.

Women also are shorted when it comes to workplace rewards aside from earnings, including

SOURCE: © Greg Perry.

job autonomy, authority, and promotion opportunities. A recent survey of about 3000 Canadians found that women were less likely to report autonomy and authority than men were across a wide variety of occupations (Young and Schieman, 2018). Other studies show that women are also less likely to be promoted than men are even if their on-the-job performance is the same as that of men (Blau and DeVaro, 2007; Javdani and McGee, 2015).

The situation appears to be similar for LGBTQ people. Although there is relatively little research on wage inequality and sexual identity, existing studies suggest that sexual identity is a determinant of wage inequality (Klawitter, 2015). Within marriages, sexuality and gender intersect to produce gradations of income inequality. Among white, non-immigrant married people, straight men are the highest paid category, followed by gay men. Among married women, however, the story is different. Lesbian women earn less than men but more than straight women, even after controlling for education, age, and occupational status (Denier and Waite, 2019; Wait and Denier, 2015). This research suggests that gender and sexuality work together to produce wage differentials that value masculinity and, for single women, heterosexuality.

Precarious Employment

Women are also overrepresented in precarious or nonstandard work, which may be part-time, seasonal, contract-based, or held in conjunction with one or more other, similar jobs (Young, 2010). Precarious work is characterized by low pay, instability of employment, and lack of benefits such as an employer pension and a dental plan. In the study of 3000 Canadians mentioned earlier, men were found to be significantly more likely than women were to work 40 or more hours per week and to work overtime (Moyser, 2017; Young and Schieman, 2018). This is particularly the case among racial and ethnic minorities. In the United States, the number of black women doing precarious work increased 90 percent between 1979 and 2015, while the number of black men doing precarious work increased 57 percent (Branch and Hanley, 2017).

Some women undoubtedly prefer part-time jobs so they can more easily take care of their children. However, sociological research repeatedly shows that many women do not share this preference (Bianchi, Robinson, and Milkie, 2006; Duffy and Pupo, 1992; Stone, 2007). More than 30 percent of Canadian women working part-time prefer to work more hours and make more money (Moyser, 2017).

Women used to be less likely than men to be union members. However, the unionization gender gap has closed in the past few decades; the unionization rate for women now exceeds that for men (36 percent compared to 31 percent) (Moyser, 2017). That is largely because unionization rates in the private sector of the economy have declined while unionization rates in the government sector have increased—and most public-sector employees are women (Morissette, Picot, and Lu, 2013).

In this era of precarious labour, gender and sexuality intersect in interesting ways. For example, a study of the fashion industry shows that although the industry is dominated by women, the careers of gay men are often boosted by fashion gatekeepers, such as advertising executives who give them increased attention and publicity that elevate their status. Perhaps relying on stereotypes of gender and sexuality, gay men in fashion are understood to be more artistic in their fashion designs, while women are seen as being more practical. The fame and fortune of a few big-name designers mask the precariousness of labour for most fashion workers (Stokes, 2015).

TIME FOR REVIEW

1. What are the main reasons for the gendered division of labour?
2. What is the difference between horizontal and vertical occupational segregation?
3. How do you explain the persistent gender wage gap in Canada today?

EXPLAINING GENDER AND LGBTQ INEQUALITY IN PAID WORK

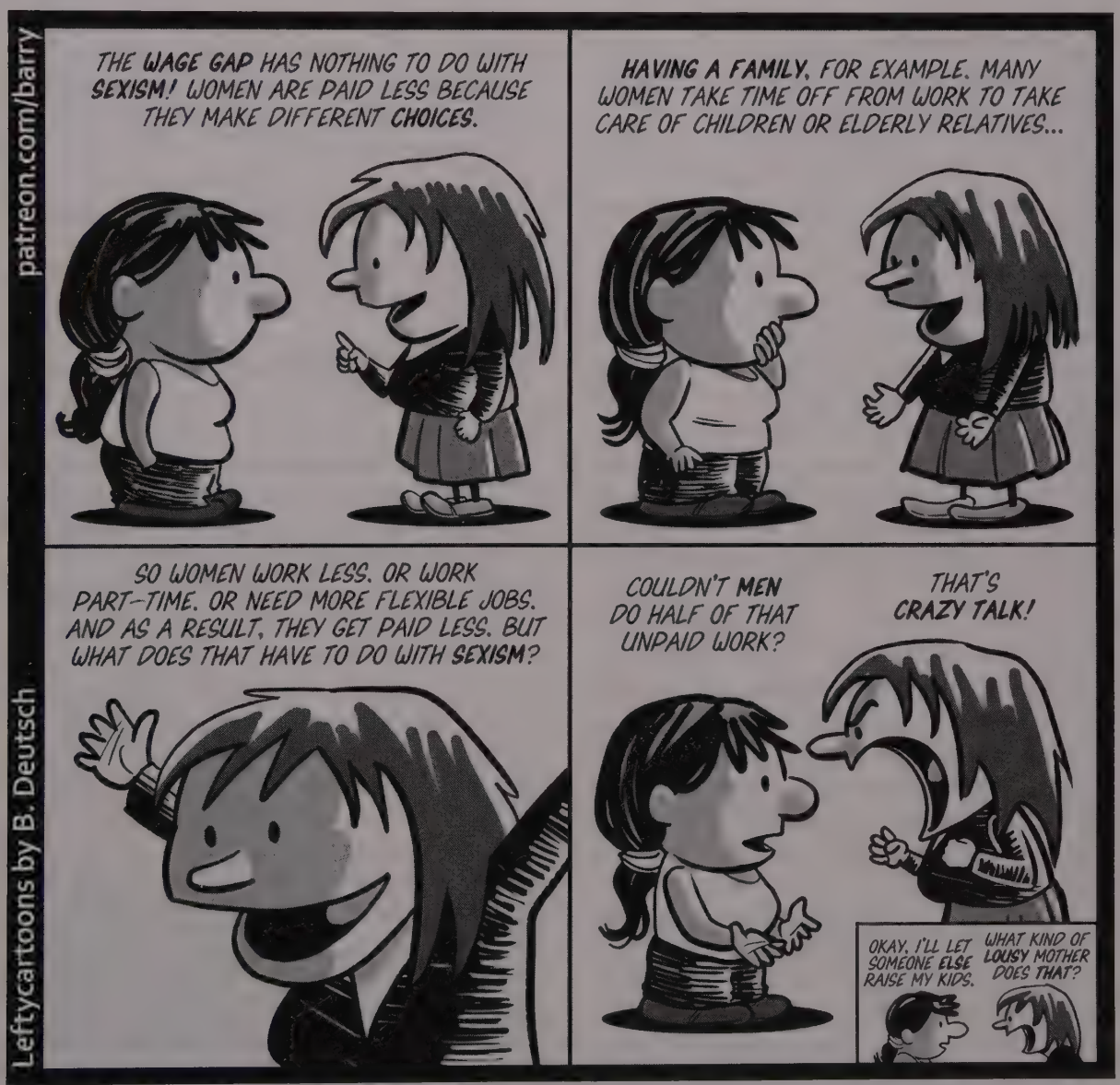
How can we explain gender and sexuality inequalities in paid work? *Supply-side* arguments hold that some people invest more time, energy, and education in work, so they are rewarded more highly than those who invest less. In most cases, men are assumed to invest more, so they are paid more. *Demand-side* arguments emphasize the institutional and structural barriers that constrain participation in paid work. These constraints supposedly limit demand for women and LGBTQ people.

SUPPLY-SIDE EXPLANATIONS

Human Capital Theory

Researchers have examined two main supply-side forces: human capital and the personal preferences that derive from sex-role socialization.

Human capital theory proposes that a person's location in the labour market depends largely on that person's rationally chosen investment in education and skills, which constitute that person's human


patreon.com/barry
THE WAGE GAP HAS NOTHING TO DO WITH SEXISM! WOMEN ARE PAID LESS BECAUSE THEY MAKE DIFFERENT CHOICES.
HAVING A FAMILY, FOR EXAMPLE. MANY WOMEN TAKE TIME OFF FROM WORK TO TAKE CARE OF CHILDREN OR ELDERLY RELATIVES...
SO WOMEN WORK LESS. OR WORK PART-TIME. OR NEED MORE FLEXIBLE JOBS. AND AS A RESULT, THEY GET PAID LESS. BUT WHAT DOES THAT HAVE TO DO WITH SEXISM?
COULDN'T MEN DO HALF OF THAT UNPAID WORK?
THAT'S CRAZY TALK!
OKAY, I'LL LET SOMEONE ELSE RAISE MY KIDS.
WHAT KIND OF LOUSY MOTHER DOES THAT?
Leftycartoons by B. Deutsch

Individual-based explanations of differences in paid and unpaid work are often rooted in traditional cultural understandings of what constitutes appropriate behaviour for men and women.

SOURCE: © Barry Deutsch.

capital. In this view, the more you invest in human capital, the more valuable you will be to the labour market and the more likely you will be rewarded with a stable, high-status, well-paying job (Becker, 1993; Mincer and Polachek, 1974).

Human capital theory assumes that men, women, and LGBTQ people enjoy equal opportunity to invest in human capital. From this point of view, individuals just *choose* different types of investment. For example, men choose to pursue education and training more than women do, while women choose to invest more in their families. Supposedly, women also choose to opt out of the paid workforce during pregnancy and after childbirth, which makes them less reliable and experienced on average. Employers therefore prefer male workers. It follows that men's greater investment in human capital leads them to be overrepresented in more lucrative jobs.

Could the explanation really be that simple? Think about your high-school graduating class. Did it have more boys than girls? Probably not, unless you went to an all-boys school. What about the postsecondary level? In Canada and other highly developed countries in recent decades, more women than men have graduated from university (Statistics Canada, 2017b). Even in all professional and graduate programs combined, most graduates are now women (Canadian Medical Association, 2012; England, 2005; Ornstein, 2010). Yet men tend to substantially outnumber women in higher-paying and more prestigious fields such as those requiring science or engineering degrees (Statistics Canada, 2017b). Why?

Sex-Role Socialization

A second supply-side theory is that women prefer domestic work to paid work, while men prefer paid work to domestic work, largely because women and men are socialized to have different work preferences (Reskin, 2002; Reskin and Roos, 1990). From this point of view, sex-specific work preferences are part of our culture, and they help to explain why men choose to work in higher-paying and more prestigious fields than women do. People learn their job preferences in families, during their school years, and through the mass media. Many women may not be inclined to pursue some occupations because they are taught that they should focus on family obligations more than men should (Reskin and Hartmann, 1986). And, in fact, research shows that most girls and young women tend to select courses of study that lead to relatively low-paying jobs with little prestige, authority, and autonomy because they expect to devote much of their lives to child rearing and housework (Eccles et al., 1999; Schroeder, Blood, and Maluso, 1993).

However, the sex-role socialization theory is overly deterministic. It makes it seem as if cultures and social institutions never change and *inevitably* socialize women and men to take particular domestic and labour market roles. Yet much historical and sociological research demonstrates that cultures and social institutions do change in ways that alter work roles. The very fact that 14 percent of women worked in the paid labour force in the early twentieth century while 75 percent of women do so today suggests that change, not stability, is inevitable (Boyd, 2014: 163; World Bank, 2018). To achieve a well-rounded understanding of gender inequalities in paid work, we must also consider demand-side explanations, to which we now turn.

DEMAND-SIDE EXPLANATIONS

Two main demand-side explanations exist. One focuses on employer preferences, the other on discrimination.

Employer Preferences

Employers may prefer hiring certain individuals over others. Consequently, women and sexual minorities may be underrepresented and under-rewarded in the workplace (Becker, 1993; Gorman, 2005; Kay and Hagan, 1998; Reskin, 2002). From this point of view, most workplaces are "gendered" and sexualized insofar as they are built on the image of an ideal worker: a straight man, fully committed to his job, without family distractions, but needing a wage to provide for his wife and children. From this point of view, the expectations of the workplace around gender and sexuality influence hiring and reward decisions to the detriment of female and LGBTQ employees (Acker, 1990; Waite and Denier 2015; Williams, 2000). We see the operation of this principle in the results of one study of 1547 Canadian MBAs who graduated between 1996 and 2007. It found that the starting pay for women was $8167 less per year than the starting pay for men, even though the women were equally qualified. Employers seem to have anticipated that the women would likely experience more career disruptions due to pregnancy and child-care responsibilities, and so paid equally qualified women less for the same work done by men (McFarland, 2013).

Discrimination

Closely related to employer preference theory is the idea of discrimination. Discrimination occurs when employers use stereotypes to focus on visible characteristics of people and, on that basis, decide that some people will be more productive workers than others will be (England, 2005; Padavic and Reskin, 2002). For example, an employer may consider a woman more suitable than a man for a nursing job, assuming the woman had more caregiving responsibilities during her upbringing and is therefore more familiar with, and adept at, the kind of work a nurse is expected to do. Male and female applicants for a nursing job may be equally qualified, but the woman is likely to get the job if such discrimination takes place.

Sociologists have found evidence of discrimination against LGBTQ workers too. For instance, one sociologist conducted a study in which she applied to job postings with résumés differing in just one way. One set of résumés mentioned a volunteer position at an LGBTQ student organization, while the other set mentioned a volunteer position at a non-LGBTQ student organization. She found that the first set of résumés resulted in 30 percent fewer callbacks, suggesting that many potential employers discriminated against applicants associated with the LGBTQ community (Mishel 2016).

Discrimination and the Intersection of Gender, Sexuality, and Reproduction

Women with children often fall victim to discrimination at the intersection of gender, sexuality, and reproduction. The **motherhood penalty** reflects the fact that mothers earn on average 7 percent less per child compared to women without children (Budig and England, 2001). The penalty is due to the extra burden of unpaid work that falls to mothers and the discrimination they face, which results in relatively low pay, fewer promotional opportunities, and less authority than non-mothers and men enjoy (Korzec, 1997).

Would you hire this woman? Employers may discriminate against hiring women because of their current or expected family obligations.

SOURCE: Zurijeta/iStock.

A team of sociologists conducted an experiment to understand these patterns of inequality. The researchers asked undergraduate students to evaluate the résumés of mothers, non-mothers, fathers, and non-fathers to determine each job candidate's level of competence and job commitment. (Keep in mind, the only criteria that varied across candidates were gender and parental status.). Students were asked to recommend salaries and promotions for each candidate. The undergraduate students in the sample were far more likely to view mothers as less competent and committed to their jobs than non-mothers and men. Further, when asked to make a salary recommendation, students suggested that mothers should make $13 000 less per year than fathers with the same qualifications. And students were far less likely to recommend mothers for promotion than non-mothers and men. When asked about mothers' competence and commitment to their work, evaluators judged them as less warm and likeable than non-mothers (Benard and Correll, 2010; Correll, Benard, and Paik, 2007). These results speak to the discrimination that plays out in the workplace. Unfortunately, these assumptions—whether true or not—can result in long-lasting detrimental consequences for women.

TIME FOR REVIEW

1. Why do many sociologists consider human capital theory and sex-role socialization theory incomplete?
2. How do gender, sexuality, and reproduction combine to explain women's inequality in paid work?
3. How does discrimination against LGBTQ people affect their employment?

INEQUALITIES IN UNPAID WORK

DOMESTIC RESPONSIBILITIES

Gender Differences

One can't fully understand inequality in paid work without considering inequality in unpaid work, because one influences the other. If people expect you to spend

most of your time taking care of the household, you can't devote as much time as you might like to work in the paid workforce. Conversely, if they expect you to be the main breadwinner, you may not be able to spend much time on child care and housework.

Do gendered work stereotypes resonate with your experience? Think back to when you were a child. Who packed your lunch for school, cleaned the house, and made dinner? Mom, Dad, or someone else? Now, think about how these arrangements might look for LQBTQ individuals. Take same sex couples, for example. How do you imagine the division of domestic labour might be split in these situations? Are these families more equal in their division of household labour, or do they fall back on gender stereotypes, assigning "masculine" and "feminine" chores?

In most Canadian households, domestic tasks, including housework and child care, are still disproportionately delegated to women. Statistics Canada data show that, on average, women spend 2.8 hours a day on housework as a primary activity, while men spend 1.9 hours (Moyser and Burlock, 2018). We can see gender differences in the number of hours spent caring for children, too, but the gap here has not narrowed much. Men and women both reported spending more time caring for children in 2015 than in 1986 (Moyser and Burlock, 2018).

The *types* of domestic tasks that men and women perform also differ. Women are more likely to perform mundane, repetitive, less attractive, daily tasks, such as meal preparation, household cleaning, dishwashing, and laundry. Men are often responsible for tasks that are less frequent and mandatory, such as lawn maintenance, car repairs, and house repairs (Bianchi et al., 2000; Young, Wallace, and Polachek, 2015).

Finally, the division of tasks associated with child care tends to be gendered. Usually, mothers are responsible for the hygienic and emotional care of the child, including bathing, clothing, and school- and health-related concerns. Fathers are likely to spend more time with their children in interactive activities—playing with them and talking and reading to them (Bianchi, Robinson, and Milkie, 2006).

LGBTQ Differences

Early research on same-sex couples suggested that such couples offered more egalitarian approaches to dividing household tasks (Gabb, 2005). However, more recent work cautions against assuming same-sex couples do not use the rubric of gender to organize their unpaid household labour (Goldberg 2013). Most couples think that their household labour is divided more equally than it really is, so relying on self-reports is inaccurate. In addition, some same-sex couples are more egalitarian than others. For example, one study shows that in black lesbian stepfamilies, biological mothers take on more unpaid labour than their partners (Moore, 2008).

Another study finds that in couples of ciswomen partnered with transmen, the ciswomen take on a greater share of unpaid household labour (Pfeffer and LaRossa, 2010). However, these women are critical of gender inequality in the home and they establish meanings around domestic labour that are not based on standard gender stereotypes. These studies show that for LGBTQ families, gender dynamics of household labour are present but are complex and contested.

EXPLAINING DIFFERENCES IN UNPAID WORK

How can we explain gender and sexuality differences in unpaid work? Theories range from those that focus on the characteristics of individuals to those that emphasize the social structures and cultures in which people are embedded. Two popular individual-centred explanations are relative resource theory and time availability theory. These theories were first developed to explain gender differences in unpaid work but may be applicable to sexuality inequalities, too.

INDIVIDUAL-CENTRED THEORIES

Relative Resources

According to *relative resource theory*, family welfare is maximized when the spouse that can earn higher income works outside the home and the spouse that cannot earn higher income does most of the unpaid domestic labour. Usually, this means men do fewer and less onerous domestic tasks than women do.

Relative resource theory assumes that power in the household operates in a gender-neutral way. This means that if things change and for some reason the woman can bring in more income than the man, paid and domestic tasks should rebalance accordingly. Yet research shows that this doesn't often happen (Bianchi et al., 2012; Lennon and Rosenfield, 1994; Young, Schieman, and Milkie, 2014). Change in time devoted to child care changes even less than time devoted to other domestic tasks (Brines, 1994). Some studies even show that highly educated women with high earnings average more child-care hours than do less educated women with low earnings (Craig, 2006).

Time Availability

A second individual-level explanation of gender differences in unpaid work is *time availability theory*, which holds that time spent in paid work limits the amount of time spent on domestic chores (Bianchi et al., 2012). Here, researchers treat time as a finite resource: There are only 24 hours in a day, and one can work only a fixed number of waking hours. From this perspective, one partner is less involved in paid work because she (less often, he) spends more time doing domestic work.

If the time-availability theory was fully valid, a woman's time spent doing domestic work should fall proportionately with an increase in her time doing paid work. Yet this is not necessarily the case. Most women do most of the housework even if they work full-time. As a woman's time doing paid work increases, the time she spends on domestic tasks does not usually decrease at a comparable rate (Bianchi, Robinson, and Milkie, 2006; Marshall, 2011). This is especially true of child care. When they start working in the paid labour force, women tend to cut back on leisure, personal, and sleep time, not on taking care of their children (Wallace and Young, 2008). Findings such as these lead us to question whether couples use economically rational rules to allocate domestic chores. It seems more likely that they rely on culturally prescribed gender expectations to assign paid and unpaid work (Carriero, 2011). To explore this possibility, we need to consider cultural explanations of differences in unpaid work.

CULTURAL THEORY

The *cultural theory* of gender and sexuality differences in unpaid work highlights the way cultural ideologies of motherhood and fatherhood influence men's and women's behaviour (Berk, 1985; Bianchi et al., 2000). Its proponents argue that, to varying degrees, most women internalize the traditional idea that domestic work is primarily women's work. Consequently, women try to demonstrate that they are good wives by performing household and child-care tasks (Hays, 1996).

Gender socialization and the ideology of what constitutes a "good woman" are closely linked to the cultural ideal of "intensive motherhood" (Hays, 1996). **Intensive motherhood** refers to the predominant cultural model of the loving, maternal figure selflessly devoting most of her time and energy to her children. This ideal defines the quality of a woman in many societies; performing the motherhood role in a way that encompasses an enormous part of a woman's life is, to a considerably degree, what defines her gender. Research from parenting magazines shows that advice to mothers has grown more intensive over time (Quirke, 2006). Although intensive motherhood may seem universal, sociologists note that it is a product of class and race (Lareau, 2011). The intensive mothering of white, middle-class families is not always embraced by racialized or working-class mothers.

Women who embrace the expectations of intensive motherhood often find housework and child-care rewarding (Bianchi and Milkie, 2010; Young, Schieman, and Milkie, 2014). However, many women feel guilty about being unable to live up to these expectations (Sutherland 2010). Others have qualms about intensive motherhood and so find themselves torn between culturally imposed expectations and their desire for a different way of living (Blair-Loy, 2003; Ceci and Williams, 2010; Hays, 1996).

INTERSECTING BASES OF SOCIAL INEQUALITY FOR PAID AND UNPAID WORK

When gender and sexuality combine with other bases of inequality—age, ethnicity, race, sexuality, socioeconomic status, indigenity, and immigration status—the problems just mentioned are compounded (Browne and Misra, 2003; Creese and Stasiulis, 1996). For instance, a 50-year-old Filipina lacking higher education and Canadian citizenship is likely to work long hours near the bottom of the socioeconomic hierarchy as a nanny or a chambermaid. Her circumstances will make it especially difficult for her to meet the demands of domestic work in her own family.

The previous scenario is becoming more and more common. A big market for migrant domestic workers now exists in Canada. Almost all migrant domestic workers in this country are women. Most are from the Philippines (Gorodzeisky and Semyonov, 2005). Typically, employment agencies hire these women from overseas and match them to families that need their services. The women often live with the families that employ them and work for minimum wage.

Domestic migrant workers help to reproduce the workforces of host countries by providing child care and domestic work. They help parents balance competing work and family demands and, potentially, equalize gender inequalities in paid and unpaid work. By freeing women in host countries to work in the paid labour force, they boost household income and stimulate economic growth. At the same time, domestic

migrant workers typically transfer part of their earnings back to their home countries to help their own families (Licuanan, 1994; Meerman, 2000; Parreñas, 2000).

The globalized flow of domestic labour also has more than one downside. Many children in less developed countries are forced to grow up without their mothers. The ready availability of poorly paid female domestic workers reinforces the notion that domestic work is women's work and that women's work is worth comparatively little. Finally, more than a few foreign domestic workers are subjected to long hours of work at low pay and other forms of abuse by their employers.

Our discussion highlights the way some women tend to be more vulnerable than others and generally more vulnerable than men because their economic opportunities are limited. Women migrant domestic workers may have no choice but to leave their family to pursue economic opportunities abroad, underscoring the complex interactions among gender, sexuality, ethnicity, and nativity. The intersection of gender, sexuality, and indigeneity can lead to especially dire consequences for Indigenous women in Canada (see the Critical Sociology feature, Intersectionality and Missing and Murdered Indigenous Women and Girls).

To care for their own children financially, Filipina domestic workers must often care for someone else's children in another country.
SOURCE: © kate_sept2004/iStock.

Critical Sociology

INTERSECTIONALITY AND MISSING AND MURDERED INDIGENOUS WOMEN AND GIRLS

In Canada, Indigenous women and girls face a high risk of sexual violence and homicide. As awareness of this issue has increased, many confirmed cases of missing and/or murdered Indigenous women and girls have been documented. Growing awareness led to a national inquiry by the RCMP and Department of Justice. When their report was released it revealed a staggering number of Indigenous women and girls who were either missing or murdered since 1980.

According to the 2016 census, Indigenous Canadians make up around 4 percent of the country's population. Yet the Department of Justice's (2017) report shows that Indigenous women and girls constitute 10 percent of missing women and girls in Canada. A later government report found that between 2014 and 2017, 21.5 percent of female homicide victims in Canada were Indigenous (Beattie, David, and Roy, 2018).

The Native Women's Association argues that a history of colonialism and the resulting narrative describing Indigenous women as "dirty, lewd, uncivilized or sexually deviant" are at the heart of the overrepresentation of Indigenous women among homicide victims (Guthrie Valaskakis, 1999). Colonial practices such as the establishment of residential schools caused mental health issues that resulted in increased dependency on drugs and alcohol, exposing women to increased risk of family violence (National Council of Welfare, 2007).

The purposeful destruction of native culture, the establishment of reserves, and socioeconomic discrimination at a high level contributed much to creating high-risk environments inside and outside the family. According to the Canadian Centre for Policy Alternatives (2010), Indigenous women are at a higher risk for poverty, low educational attainment, high unemployment, poor physical and mental health, and a lack of housing than are non-Indigenous women. Many of these risk factors have been associated with increased exposure to violence.

Steps have been taken to increase health and victim support in Indigenous communities, address gaps in services in Indigenous communities, and devote RCMP resources to the issue of missing and murdered Indigenous women and girls (Indigenous and Northern Affairs Canada, 2018). Still, the rising proportion of Indigenous women among homicide victims shows that not enough is being done to ameliorate the situation.

Critical Thinking Questions

1. Do you think the Government of Canada is doing enough to address the issue of missing and murdered Indigenous women and girls?
2. Why do you think many missing and murdered Indigenous women and girls went undetected by law enforcement officials for such a long period of time?

CLOSING THE GAP: INITIATIVES TO EQUALIZE STATUSES

As noted earlier, new laws and regulations have increased equality for gender and LGBTQ groups. However, much inequality remains. To continue reducing inequality, political, cultural, and individual initiatives are required.

SOCIAL GROUPS AND POLITICAL ACTION

Political solutions include government laws, policies, and regulations that help reduce the gendered division of labour and discrimination by gender and sexuality in the workplace. Such regulations reduce discriminatory practices among employers and help mothers balance work and family demands by providing accessible, affordable, high-quality day care, for example.

HUMAN RIGHTS POLICIES

Anti-discrimination policies are an important foundation for diminishing inequalities of gender and sexuality. The Charter of Rights and Freedoms, which guarantees equal rights under the law, and the Human Rights Code, which prohibits discrimination, are important steps toward eliminating inequality. However, these policies don't solve the problem entirely, in part because discrimination is difficult to see in any individual hiring decision; instead, its effects become visible in patterns formed by differences caused by the choices of many individuals. Another limitation of human rights policy is that some sources of inequality, such as the uneven distribution of unpaid labour, are not caused by unequal treatment under the law. The unequal distribution of unpaid labour is rooted in norms, not laws.

EMPLOYMENT POLICIES

The 1995 Employment Equity Act is a key example of a policy aimed at increasing the representation of disadvantaged groups in Canada's paid labour force. The purpose of the act is "to achieve equality in the workplace so that no person shall be denied employment opportunities or benefits for reasons unrelated to ability."

While encouraging, researchers and policy analysts question the Act's effectiveness in practice. One study covering the period 1997–2004 found that employment equity was increasing but the rate of increase was slowing (Jain et al., 2010). Some analysts argue that hiring more women and members of other disadvantaged groups is so slow that it amounts to little more than **tokenism**, a symbolic gesture that makes it seem progress has been made when it actually doesn't amount to much.

This argument gains credibility from another finding: increased equity is more a result of hiring of members of racial minority groups and people with disabilities than of women. While some scholars forecast that the Employment Equity Act might eventually have a big impact, others argue that women's representation will increase substantially only when the organizational culture of the workplace changes—when deeply embedded and persistent norms and values that govern hiring are no longer biased against women (Stichman, Hassell, and Archbold, 2010).

Regulations concerning labour standards seek to equalize men's and women's treatment in paid work. For instance, Ontario passed the Employment Standards Act in 2000. It guarantees that men and women receive equal pay for equivalent work. Legislation defines jobs as equivalent if they are equally demanding, require the same amount of skill and responsibility, and are performed in similar contexts and work conditions (Ontario Ministry of Labour, 2013). A more recent addition to this Act is the Fair Workplaces, Better Jobs Act (Bill 148, also known as the Equal Work for Equal Pay Act). Employment status is defined by (a) the number of hours that employees work and (b) the terms of their employment (temporary, casual, seasonal or permanent positions). Under Bill 148, employers must pay equal wages to people of similar employment status. For example, the hourly pay of a woman working part-time at McDonald's must be the same as that of a man working full-time performing the same sort of duties. This is an example of how government policies can influence equality in the workplace.

Some employment policies reduce gender inequality, even though they are gender neutral on their face. For example, policies that increase the minimum wage can reduce gender inequality. In Canada, where women are overrepresented in minimum-wage occupations, giving a raise to all minimum-wage workers reduces gender inequality. Similarly, tax policies that increase taxes on the highest earners reduce gender inequality because men are overrepresented in this group (Richards, 2019).

FAMILY-FRIENDLY POLICIES IN THE WORKPLACE

Workplace policies have also encouraged greater equality in paid and unpaid work. Many reputable organizations now have work-family balance programs (see "Canada's Top 100 Employers," 2018, for an overview of the most family-friendly workplaces in Canada—the Bank of Canada was in the #1 spot). These programs involve on-site day care and flexible work schedules to accommodate family commitments.

Employers have also started introducing paternity leave for families with newborns. Government initiatives have encouraged these efforts. For instance, the Canadian government introduced an 18-month parental leave policy in December 2017. The benefits of paternity leave are twofold. It allows men to play a more important role in the domestic sphere and alleviates some of the burden faced by new moms. It also helps to reshape ideas governing men's and women's appropriate work roles by normalizing men's absence from paid work and dedication to domestic responsibilities.

Despite the availability of paternity leave, few fathers take advantage of it because of feared consequences. Many bosses frown on paternity leave. Most male workers don't expect it. In 2015, just 12 percent of Canadian fathers outside of Quebec took leave when their children were born, comparable to the 11 percent who registered for leave a decade earlier (*Globe and Mail*, 2017). So what's the solution? Sociologist Jennifer Berdahl recommends legislation *requiring* that fathers take paternity leave. She wrote:

> One of the most effective ways to encourage men to take paternity leave is through legislation—most of the increase in Canada's dad-leave stats is thanks to Quebec, which introduced five weeks of leave available only to fathers in 2005. Since then, the number of Québécois men taking leave has jumped to 76 percent, compared to 11 percent in the rest of the country (quoted in O'Kane, 2013).

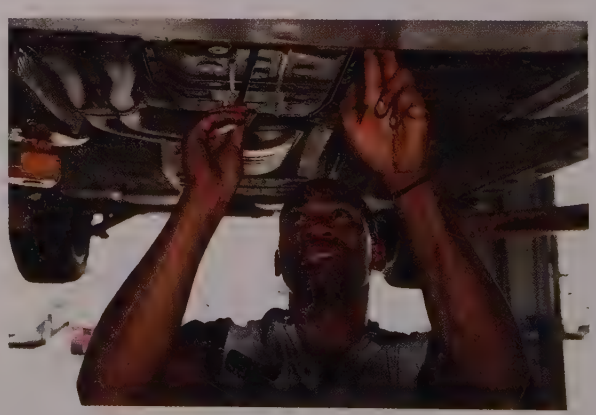
Despite the benefits of legislated paternity leave, it may be some time before we see it enforced outside Quebec. Resistance to changing family forms can lead to stigmatizing and discriminatory reactions from workers and employers. Therefore, successful implementation and use of paternity leave requires a transformation in cultural values and behaviours in addition to the introduction of formalized policies.

CULTURE CHANGE, GENDER EXPECTATIONS, AND THE LGBTQ COMMUNITY

CHANGING PERCEPTIONS OF GENDER ROLES

While the policies discussed earlier are steps in the right direction, they do not affect traditional stereotypes of men's and women's roles in paid and unpaid work. When was the last time you saw a commercial featuring a man mopping a kitchen floor or a woman hard at work fixing the underside of a car? Probably never. Gendered images perpetuate work stereotypes in commercials, TV programs, movies, popular literature, and video games. We see these differences conspicuously in the businesses around us. For example, a popular moving company in southern Ontario is "Two Men and a Truck" even though women are employed by the company. The name of a well-known cleaning business in Hamilton, Ontario, is "Molly Maids" (Molly, of course, being a woman's name; and the company hires only women). It is difficult to imagine that we can achieve substantially greater equality in paid and unpaid work until images of what it means to be an ideal mother, father, and worker change at a societal level (Acker, 1990; Blair-Loy, 2003; Hays, 1996).

Surveys show that younger people are on average more gender-egalitarian than older people are, in part because younger people are more exposed to women in nontraditional roles. That circumstance helps to shape their conception of gender-appropriate norms (Pampel, 2010). However, traditional views are still



Household cleaning is often seen as women's work, while fixing cars is seen as men's work. These stereotypes are apparent in everyday advertising and often go unnoticed.

SOURCE: © Carolyn Franks/Shutterstock.

deeply entrenched. One example comes from a male WestJet passenger, who left a note for the pilot after discovering that she was a woman. Here is what happened:

> Female WestJet pilot Carey Smith Steacy captained a flight from Calgary to Victoria on Sunday. After landing with no issue and seeing all passengers off the plane, the crew discovered a note left behind on a napkin that stated, "The cockpit of an airline is no place for a woman."
>
> Signing the note "David," the passenger stated, "a woman being a mother is the most honor, not as 'captain.' Sorry not PC (politically correct)." He went on to list a Bible verse and say, "I wish WestJet could tell me a fair lady is at the helm so I can book another flight." Smith Steacy said David also asked flight attendants if she had enough flying hours under her belt before they even took off (Feenstra, 2014: 20).

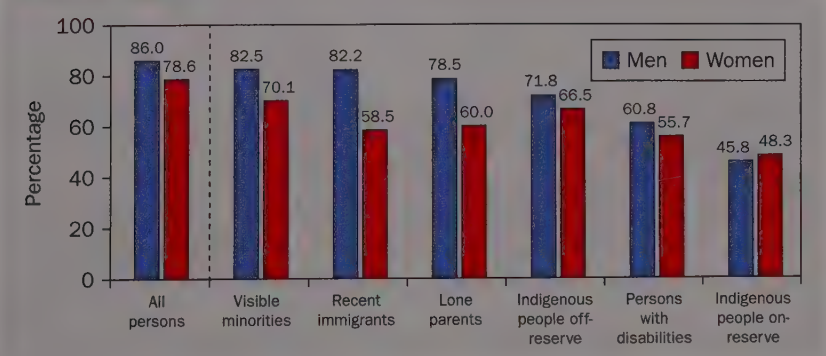
The disparaging views expressed by this passenger exemplify the stereotypes that some people still hold. The idea that a woman's proper place is in the home and that only men are fit to hold prestigious jobs reflects antiquated gender roles. The truth is that women are entering all types of occupations. Most people now expect that both parents will work for pay. The time fathers spend with their children is on the rise, and access to paternity leave is growing. The passage of progressive legislation preventing gender inequality is beginning. The roles of men and women in work and family have changed dramatically over the past century. It is now time that the institutions and ideologies of society mirror that change.

CHANGING ROLES IN CANADA: THE GENDERED DIVISION OF LABOUR

The gendered division of labour and its associated inequality are fading, although too slowly in the eyes of many people. Consider only that, in Canada, the employment rate for women with children under the age of six more than doubled between 1976 and 2015, growing from approximately 32 percent to 70 percent (Moyser, 2017). A remarkable shift in just a third of a century! However, gender differences in labour force participation vary across minority groups, with Indigenous men on reserves reporting the lowest participation rate (46 percent), followed by Indigenous women on reserves (48 percent), and then women with disabilities (56 percent). Figure 5.2 presents patterns for the most recent Canadian census data.

Recent decades have witnessed greater gender equality in terms of power and resources, too. For example, the representation of women has increased in prestigious, traditionally male-dominated occupations in science, engineering, technology, accounting, law, politics, and senior management (Ferrao, 2010; Morissette, Picot, and Lu, 2013). Gender inequalities nonetheless persist in postsecondary majors. Men account for 67 percent of graduates in science, technology, engineering and mathematics, while women make up over 75 percent of post-secondary graduates in health care and education. These trends suggest that gendered expectations of "men's" and "women's"

FIGURE 5.2 Labour Force Participation by Gender across Underrepresented Groups, 2017



SOURCE: *Labour Force Survey, Census of Population, Canadian Survey of Disabilities*, Statistics Canada; Department of Finance Canada calculations, https://www.budget.gc.ca/2018/docs/plan/chap-05-en.html.

careers are alive and well. The question then becomes, how can these patterns be changed?

Researchers have also observed greater equality in domestic work in recent decades. While the total time people spend cooking, cleaning, grocery shopping, and doing laundry has fallen by about 20 percent since 1986, a larger proportion of men are performing core housework tasks, including meal preparation, meal cleanup, indoor cleaning, and laundry (Marshall, 2009; Moyser, 2017).

A shift in the gendered distribution of child care has also occurred. Men spend a lot more time taking care of their children than they used to. The percentage of Canadian fathers who had performed a child-care task on an average day rose from 1 in 3 fathers in 1986 to 1 in 2 fathers in 2015, and the amount of time spent providing help or care to their children nearly doubled from 1 hour per day in 1986 to 1.9 hours per day in 2015 (Houle, Turcotte, & Wendt, 2017).

Men are becoming increasingly involved in child care. However, fathers have yet to fully take advantage of paternity leave from their employers for fear of stigma.

SOURCE: © Monkey Business Images/Shutterstock.

CHANGING PERCEPTIONS OF LGBTQ PEOPLE

Attitudes toward LGBTQ people in Canada have been changing rapidly over the last few decades, too. Usually, social attitudes change slowly. The attitudes of most people harden as they reach adulthood, after which they hold on to the same views for the rest of their lives. Most change in attitudes is therefore due to generational change, that is, older cohorts dying off and younger cohorts with different attitudes replacing them. However, sociologists have discovered that attitudes toward LGBTQ people are different. In their analysis of attitudes toward LGBTQ people in Canada and the United States, Andersen and Fetner (2008) found that, since 1981, attitudes toward LGBTQ people became more positive, and that each age cohort in the population changed at similar rates.

This pattern is unusual and it suggests there has been a cultural sea change on the issue of LGBTQ rights and social inclusion. Today, a large majority of Canadians support equal rights for LGBTQ people (Adamczyk, 2017). Although equality has not yet been achieved, it is a goal that many Canadians share.

TIME FOR REVIEW

1. Suppose you were asked by a policymaker working for the Canadian government, "What is the most effective strategy for reducing gender inequality in paid and unpaid work?" How would you answer this question?
2. How can employment equity policies help gender and sexual minorities?
3. What can employers do to make fathers more willing to take advantage of parental leave?

SUMMARY

1. **How do essentialist and social constructionist views differ in their approaches to understanding gender and sexuality?**
   Essentialists tend to view gender and sexuality as innate and deterministic. Such a view does not consider how expectations and performances of gender and sexuality change over time and vary across cultures. Social constructionist approaches assume that identities, behaviours, and expectations of gender and sexuality are influenced by the cultural and social institutions with which people engage daily. Social constructionists do not presume gender and sexuality are fixed in time and space.

2. **Why is it problematic to think about gender and sexuality as binaries?**
   Believing that the categories "men" and "women" exhaust all gender possibilities and that "homosexual" and "heterosexual" exhaust all sexuality possibilities diminishes the variety of identities and behaviours that people enjoy.

Labels including cisgender, transgender, and bisexual allow analysts to better capture the continuum of people's identities and behaviours.

3. **Are men and women equally represented and rewarded in the labour market? What about LGBTQ people?**
Women are segregated across and within occupations. They tend to hold jobs characterized by less power and fewer rewards than jobs held by men. On average, women receive less pay than men, are promoted less often, and hold less authority over others. However, women are making progress in achieving equality in the workplace. Less research is available on LGBTQ people, but studies suggest that they receive fewer rewards and endure more negative consequences in the workplace than others do. Often, sexuality and gender interact to influence inequalities in paid work, as demonstrated by the motherhood
wage penalty.

4. **How do sociologists explain gender and LGBTQ differences in paid work?**
Common explanations for gender and LGBTQ inequality in paid work include supply-side and demand-side theories. Supply-side theories emphasize characteristics of the worker. Demand-side theories emphasize characteristics of the labour market and employers.

5. **How does gender shape the performance of unpaid domestic work, and how do sociologists explain these patterns? How do these patterns differ for heterosexual and LGBTQ people?**
Among heterosexual couples, women tend to perform the lion's share of domestic work. However, men are increasing the time they spend in child care and informal caregiving. Many same-sex couples are critical of gendered domestic inequality in the home and defy gender stereotypes in the division of labour. Explanations for gender differences in unpaid work focus on relative resources, time constraints, and cultural constraints.

6. **How can inequality be reduced between men and women and between sexual majorities and minorities in paid work and the domestic sphere?**
Government and workplace policies can help to reduce such inequalities, as can the development of new norms concerning culturally appropriate roles based on gender and sexuality.

QUESTIONS TO CONSIDER

1. Common explanations for inequality focus on individual choice or structural constraint. Can you think of an example to illustrate how both choice and constraint have influenced your current or previous experience in paid or unpaid work?

What policy recommendations would you make to reduce discrimination against women and LGBTQ individuals in the workplace? Why do you think these policies would be effective?

GLOSSARY

Cisgender (p. 103) describes people whose experience of their gender matches their assigned sex at birth.

Essentialists (p. 104) observe male–female differences in sexual scripts, the division of labour at home and in the workplace, mate selection, sexual aggression, jealousy, promiscuity, fidelity, and so on. They then interpret these differences as natural and universal.

Gender (p. 102) can be understood as the set of social expectations for how men and women are supposed to behave according to cultural standards—the system of rules that tell us about masculinity and femininity.

Gender identity (p. 103) is identification with, or a sense of belonging to a particular sex—biologically, psychologically, and socially.

Gender norms (p. 103) are behaviours that can be adopted by men or women, but our culture has associated each with a particular gender. These associations affect how many men and women act.

The **gender wage gap** (p. 109) is the discrepancy between men's and women's earnings.

The **gendered division of labour** (p. 106) is the allocation of work to people in the public or private realm based on sex differences.

Heteronormativity (p. 103) is the belief that one's biological sex should be perfectly aligned with one's sexual preferences, gender identity, and gender role.

Heterosexuals (p. 103) prefer sexual partners of the opposite sex.

Homosexuals (p. 103) prefer sexual partners of the same sex.

Horizontal segregation (p. 108) reflects the unequal distribution of men and women across occupations.

Human capital theory (p. 111) argues that one's location in the labour market depends largely on one's rationally chosen investment in education and skills.

Intensive motherhood (p. 115) refers to the predominant cultural model of the caring, loving maternal figure that comes to define the overall quality of a woman.

Intersectionality (p. 107) refers to how various dimensions of inequality interact to influence individuals' experiences.

The **motherhood penalty** (p. 113) is the negative wage consequence mothers face after having children. Mothers earn less per child compared to women without children.

Patriarchy (p. 105) is a gendered belief system that privileges men above women in matters of power and authority.

Power (p. 107) is the ability to impose one's will on others despite resistance.

Resources (p. 107) are extrinsic or intrinsic assets that individuals can draw on to aid or contribute to short- or long-term endeavours.

Responsibilities (p. 107) are the obligations that people are expected to meet.

Sex (p. 102) is assumed to be *biologically* based. We often use the terms "male" and "female" to distinguish between the biological genitalia of individuals. However, some people are born with bodies that do not conform to this binary understanding of sex.

Sexual identity (p. 103) refers to one's identification—biologically, socially, and psychologically—with certain sexual behaviours and attractions. Straight, gay, lesbian, and bisexual are common sexual identity terms used today.

Sexual orientation (p. 103) refers to the way a person derives sexual pleasure, including whether desirable partners are of the same or a different sex.

Sexuality (p. 103) involves actions that are intended to produce erotic arousal and genital response.

Social constructionism (p. 104) is the main alternative to essentialism. Social constructionists argue that gender differences are not the product of biological properties, whether chromosomal, gonadal, or hormonal. Instead, gender and sexuality are products of social structure and culture.

Tokenism (p. 117) involves employers making largely symbolic gestures to demonstrate increased minority representation in the workplace.

Transgender (or "trans"; p. 103) people are uncomfortable with the gender assigned to them at birth or do not fit neatly into male or female gender categories.

Vertical segregation (p. 108) is the unequal distribution of men and women within occupations.

CHAPTER 6

COMMUNICATION AND MASS MEDIA

Sonia Bookman UNIVERSITY OF MANITOBA

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Identify the social significance and key characteristics of the mass media.
- Summarize the main sociological explanations of mass media influence.
- Distinguish different types of mass media.
- Outline the potential of social media to contribute to, and limit, the democratization of communications and culture.

WHY STUDY THE MASS MEDIA?

On October 5, 2017, *The New York Times* published a story that detailed multiple allegations of sexual assault and harassment against a high-profile Hollywood producer. Actor Alyssa Milano responded by calling on other actors and the wider public to share their own experiences of sexual harassment and assault with the hashtag #MeToo. The "Me Too Movement" had started in 2006, when American activist Tarana Burke identified a need for better support for survivors of sexual violence. However, in 2017, it went viral when women around the world, along with famous celebrities, including Canadian actors Ellen Page, Sarah Polley, and Rachel McAdams, started to share their stories using the #MeToo hashtag.

The movement generated much social activism offline. For example, in December, 2017, hundreds of people participated in a #MeToo March in downtown Toronto to advocate for better services for those who experience sexual violence and changes to policy and behaviour regarding sexual assault and harassment. The movement's success was recognized by the *Canadian Press*, which named #MeToo and the discussion it generated the story of the year. *Time* magazine named the women involved 2017 Person of the Year. The Canadian Women's Foundation described the movement as a "watershed moment in the advancement of gender equality" (Canadian Women's Foundation, 2018). Canadian government, industry, and various institutions have been actively developing new policy and allocating resources to address the issue (Canadian Women's Foundation, 2018).

In 2006, civil rights activist Tarana Burke began using the phrase "Me Too" to raise awareness of the pervasiveness of sexual abuse and assault in society. The phrase was popularized by Alyssa Milano in 2017, resulting in the viral "Me Too Movement" that encourages survivors of sexual misconduct to publicize their experiences.

SOURCE: © Kathy Hutchins/Shutterstock.

#MeToo is one of many social movements that have gone viral in the past decade with the help of social media. Another example is Idle No More—one of the largest grassroots Indigenous social movements in Canadian history. It started with an exchange of emails among four women in Saskatchewan. Jessica Gordon, Sheelah McLean, Sylvia McAdam, and Nina Wilson organized a teach-in about Bill C-45. Introduced by the Conservative government in October 2012, the proposed bill threatened to erode Indigenous sovereignty and environmental protections. The teach-in in Saskatoon was promoted on the Idle No More Facebook page (Idle No More, 2014a).

Similar events followed, and the movement quickly grew to encompass a broader range of issues, including the demand for adherence to traditional treaties, a call for increased consultation regarding development projects, and resistance to violence against Indigenous women (Idle No More, 2014b). Information about the movement circulated widely through its Facebook page, an official website, and the hashtag #IdleNoMore. After capturing the attention of mainstream media, thousands participated in the movement's National Day of Action on December 10, 2012, as well as hundreds of subsequent rallies, teach-ins, and round dance flash mobs across the country.

#MeToo and #IdleNoMore illustrate the growing importance of social media in mobilizing social activists. As I discuss later, social media not only enable campaign messages to spread quickly through people's online networks, they also create opportunities on a global scale for participating in movements that aim to change society. They allow social movements—collective attempts to change

aspects of society—to go viral, making them a cultural sensation.

Social media represent just one (albeit a very important) segment of the mass media, which include TV, the movies, newspapers, magazines, radio, and so on. Nonetheless, the use of social media typified by #MeToo raises several questions that sociologists ask when analyzing the mass media in general: How do the mass media affect individuals, institutions, and collective processes such as the growth of social movements? In turn, how does society shape media images, institutions, and industries? How can we explain the influence of the media, its institutions, and its relationship to society?

In this chapter, I address each of these questions. I outline key approaches to understanding the mass media, focusing on different aspects of media production, messaging, and consumption. I also explore contemporary media developments and trends, notably the rise of social media and their impact on communications and culture. First, however, it is important to discuss exactly what sociologists mean by *mass media*.

WHAT ARE THE MASS MEDIA?

What comes to mind when you think of the mass media? Mobile phones? Advertising? The Walt Disney Company? The mass media encompass all such technologies, institutions, and processes. However, it is less useful to define the mass media by listing examples than by discussing their chief characteristics. The **mass media** are technology-driven and usually profit-driven methods of communicating meaningful information between one source and many recipients or between many sources and many recipients (O'Shaughnessy and Stadler, 2012). Let us consider the features of this definition in detail:

- *The mass media are technology-driven means of communication.* All **communication** involves people exchanging meaningful information using signs or representations of things, people, events, and ideas. The mass media are one means of communication. However, they differ from talking face to face insofar as they employ technology to send and receive messages across time and space.
- *The mass media link many people.* Two tin cans joined by a taut piece of string are a technology that links a sender and a receiver, allowing them to communicate meaningful information. However, such a device is not a *mass* medium because it links only two people. The mass media link many people. Newspapers, books, magazines, radio, the movies, television, and various Internet and mobile phone applications, including YouTube, Facebook, and Twitter, qualify as mass media.
- *Traditional mass media involved one-to-many communication.* Until recently, the mass media transmitted messages from single, fixed sources to large audiences. The first truly mass medium, the printing press, was developed by Johannes Gutenberg in 1455 using movable metal type to print multiple copies of a text (Lorimer, Gasher, and Skinner, 2008). Steam and other technologies were adapted to printing in the eighteenth and nineteenth centuries, allowing the mass production of books, newspapers, and print advertisements (McFall, 2004). The late nineteenth and early twentieth centuries witnessed the introduction of film, radio, and broadcast television, but even these electronic media involved communication from single sources to many audience members in a top–down fashion.
- Audiences have since become fragmented. The introduction of cable, satellite, and digital television has allowed television channels to multiply. Compared to the early days of television when audiences could choose from just a few channels, telecommunications providers now offer hundreds of specialty channels, packaged and targeted to niche audiences. Moreover, instead of watching television with others in a living room or pub, we can stream digital television and watch shows on our mobile phones. Television viewing is thus transformed into an individualized experience.
- *New media involve many-to-many communication.* In the early 1980s, mass-produced personal computers became widely available. Engineers had already invented hypertext—a way for a computer monitor to display text containing links to other text that a user could access. Then, in 1989, Tim Berners-Lee developed an implementation of hypertext on a computer network via the Internet, giving birth to what became known as the World Wide Web. It was now possible for anyone with the appropriate technology to communicate with many other people, a process that was greatly aided by the introduction of the first graphical browser and the first smartphone sold to the public in 1994. The Internet thus initiated

"Modern Advertising: A Railway Station, 1874," by Alfred Concanen. In the nineteenth century, industrialized print technologies were first used to make advertising posters, which were posted in public spaces such as railway stations.
SOURCE: © SSPL/Getty Images.

a process of media "demassification," allowing ordinary individuals to create and circulate their own messages to many other people.

The new media that have emerged since the early 1990s and that we use every day when we fire up our smartphones, laptops, and tablets integrate digitized data, text, sound, and images. They enable people like you and me to create content like skateboarding videos using GoPro cameras, and to broadcast them on platforms such as YouTube. The new media are wireless and mobile, allowing us to communicate on the fly. Audience members can interact with the content, modify it, and recirculate it to others, contributing to popular memes such as Grumpy Cat (where images of Grumpy Cat are modified with mainly ironic captions), for instance. So, while traditional mass media involved "one-to-many" communication, the new media make "many-to-many" communication possible (see Table 6.1).

- *Commercial interests strongly influence the mass media.* Most mass media, traditional and new, are dominated by large corporations whose main goal is to satisfy advertisers and earn profits for shareholders. For instance, the market value of Alphabet, Google's new parent company, was US$726 billion in late December 2018. Google is primarily a search engine, dominating Internet search globally with nearly 80 percent market share in 2017, but it has also acquired companies such as YouTube and Blogger, and operates a variety of email, cloud storage, mapping, and online advertising services (Hesmondalgh, 2013: 329). Beyond Google, Alphabet owns many other businesses working on all manner of experimental projects, including self-driving cars, drone delivery, geothermal power, and cybersecurity, making Alphabet a powerful market force.

The foregoing considerations clarify why I define the mass media as technology-driven and usually profit-driven methods of communicating meaningful information between one source and many recipients or between many sources and many recipients. Bearing this definition in mind, we can now consider how the mass media influence us.

MASS MEDIA AND SOCIETY

Think of the mass media that you encounter in a typical day. You might wake up to an alarm app on your mobile phone, check your Fitbit to see how many steps you took to the bus stop, text friends to arrange an afternoon coffee break, catch an episode of a series

TABLE 6.1 Traditional Media and New Media Compared

TRADITIONAL MEDIA . . .	NEW MEDIA . . .
Use analogue information (recordings of sound and light waves)	Use digital information (translations of sound and light waves into digits—0s and 1s—thus removing noise, compressing bandwidth, and increasing security, among other advantages)
Employ a broadcast (one-to-many) model of communication	Employ a network (many-to-many) model of communication
Reach a mass audience	Reach a more fragmented audience
Use immobile, centralized production facilities	Decentralize production and render it more mobile
Allow communication from sender to receiver	Allow interaction between sender and receiver
Separate means of communication into different devices (telephone, television, radio, book, stereo system, and so on)	Converge types of media into one device (for example, a smartphone combines the functions of a telephone, a television, a radio, a book reader, a music player, a Web browser, and a GPS device)

SOURCES: Based on T. Flew and T. Smith, *New Media: An Introduction,* Canadian ed. Toronto: Oxford University Press, 2011; M. O'Shaughnessy and J. Stadler, *Media and Society,* 5th ed., South Melbourne, Australia: Oxford University Press, 2012.

on Netflix, and upload a photo of your latest ethical Toms shoes purchase on Instagram. The mass media are not just an important part of everyday life—they are by some measures the most important part. They offer information, entertainment, a means of staying connected to family and friends, and a way to meet new people. If you are like most North Americans, you spend more time interacting with the mass media than engaging in any other single activity, including working, studying, and sleeping. So exactly how do the mass media influence us?

The easy answer is that the mass media help us define who we are as individuals and as members of a range of collectivities, including our local community, ethnic group, religious group, and country. (We'll get to the hard answer later.) Where do you get your ideas about the clothes that are fashionable this season? The movie you're dying to see this weekend? Which careers are worth pursuing? What you want in a life partner? How to treat others and how others should treat you? Certainly, you learn some of these things directly from your family, friends, school, religious institution, and so on. However, insofar as the mass media create "imagined communities" and entice you to join them, they contribute heavily to your socialization, your culture, and therefore your sense of self.

An **imagined community** is a social world composed of members who do not necessarily know each other or meet in person yet consider themselves part of that social world (Anderson, 1989). There are about 37 million Canadians. You may know a couple of hundred of them personally. What links you to the other 36 999 800? Anderson (1991) discussed how print media, particularly newspapers, allowed readers to think of themselves as part of a national collective and, as such, facilitated the emergence of the nation as an imagined political community. More recently, CBC's *Hockey Night in Canada* broadcasts National Hockey League games, connecting hockey fans across the country as part of a community of Canadians who share a passion for the sport. CBC news programs invite viewers to engage with Canadian social and economic issues, such as Canada's response to various refugee crises, or how to proceed with transcontinental pipeline development. Tim Hortons advertising provides us with images of Canada as a multicultural community where ordinary people bond over shared interests (winter sports), common values (politeness), and, of course, a taste for Tim Hortons coffee. Canada is depicted sentimentally in Tim Hortons commercials as a community where Canadians feel at home and in which the brand is a source of comfort, "an integral, indispensable, and dependable part of ordinary Canadian life" (Cormack, 2008: 370). Some people say you're not a true Canadian unless you know the meaning of three numerical expressions:

Tim Hortons advertising draws on ordinary Canadian culture to situate itself as a purveyor of not only coffee, but Canadianness itself.
SOURCE: © Tim Hortons.

99, two-four, and double-double. Chances are you learned the meaning of these terms from the mass media.

Modern mass media untether imagined communities from single, fixed locations. As late as the 1970s, Canadian immigrants were largely cut off from their countries of origin apart from occasional letters and perhaps a rare trip to the homeland for a special occasion. Today, immigrants from India, Pakistan, the Philippines, Egypt, China, Russia, and elsewhere think nothing of watching programs from their country of origin on satellite TV and participating in video calls with friends and relatives back home using Skype. Doing so enables them to maintain their ethnic ties and identity in a way that was impossible before the era of inexpensive global communication. Moreover, social media allow new kinds of imagined social communities to form—communities based not on kinship, geographical origin, or physical proximity but **virtual communities** based on shared interests, existing on the Internet and in the minds of their members (Rheingold, 1993). If you are a Lego fan you can swap photos and share stories on Instagram using the hashtag #legoideas, and if you are looking for a dating site that caters to zombie lovers or people who want to live gluten-free, well, you can become a member of those imagined communities, too.

Earlier I asked, "So exactly how do the mass media influence us?" I replied, "The easy answer is that the mass media help us to define who we are as individuals and as members of a range of collectivities." That much should now be clear. But what then is the hard answer? Arriving at the hard answer first requires recognizing that expressions like "the mass media help us to define who we are" are pretty vague statements of cause and effect, insofar as they give no indication of *how* the mass media help us to define who we are or *how much* they help us to do so. Scholars disagree about these issues (Hjarvard, 2013). We need to understand their analyses to sort out the hard answer for ourselves.

On one hand, some analysts make it seem as if people are just complex iRobots. I refer to this school of thought as **media determinism**. From the point of view of some media determinists, we are programmed to buy, aspire, envy, vote, eat, dress, dance, protest, and love in ways that suit those who control the mass media and entice us with their ideals of the good life. Others emphasize the role of media technologies, suggesting that they shape communications and culture more broadly. On the other hand, some analysts maintain that we are free to choose the media messages that suit us. I refer to this school of thought as **media voluntarism**. From the point of view of media voluntarists, *we* decide who we are and which imagined communities we will join, the mass media merely offering us an inviting menu of options almost without end. As you will see, the truth lies somewhere between these two views.

TIME FOR REVIEW

1. What are the key characteristics of the mass media?
2. What is new about new media?
3. What are imagined communities? How do the mass media help to create the imagined communities you participate in?

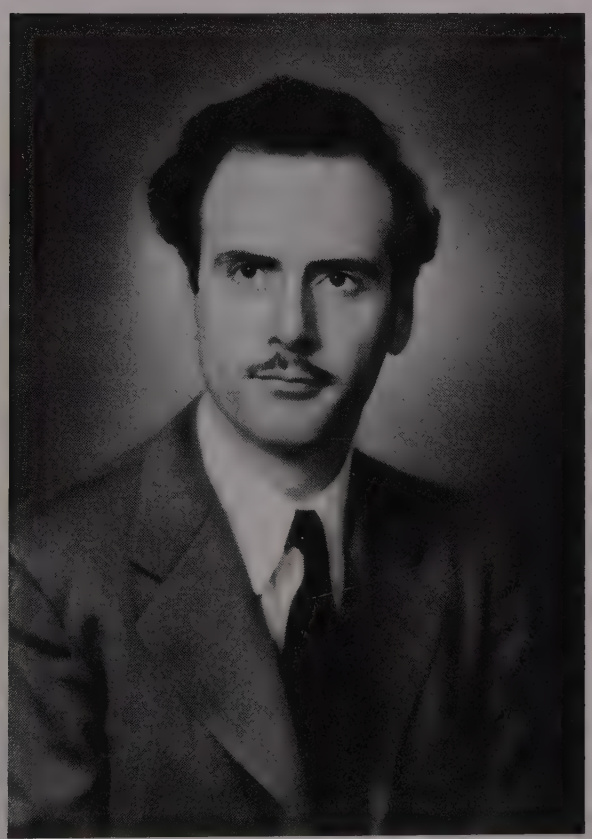
DETERMINISTIC THEORIES OF MEDIA INFLUENCE

INNIS AND McLUHAN

Canadian scholars Harold Innis (1894–1952) and Marshall McLuhan (1911–1980) were early pioneers in the study of the mass media and both were media determinists. Innis (1951) distinguished time-based media that are characterized by endurance and relative immobility (such as writing on stone tablets) from space-based media that are relatively short-lived but can easily traverse great distances (such as radio signals). He sought to demonstrate the important role that various media played in the establishment and survival of empires since early civilization (Tremblay, 2012). Specifically, time-based media foster traditionalism and helped to establish long-lasting empires dominated by religious power. Space-based media encourage colonization, vast empire-building, and the growth of secular states and armies.

McLuhan (1964) emphasized that when new mass media are introduced, the way we perceive and think changes. For instance, printing undermined oral communication. Pre-literate cultures were based on talk. Print media encouraged the development of cultures that are more visually oriented, abstract, individualistic, and rational than pre-literate cultures. In the twentieth century, electronic media undermined print-based cultures. For instance, television affects its audience more deeply than print does because it combines hearing with seeing. It is also more socially inclusive than print is because watching television requires less training and effort than reading does and so is accessible to more people.

Finally, television allows communication to occur at the speed of light. It shrinks the world, creating what McLuhan called a "global village." Yet, for McLuhan, global interdependency does not necessarily imply a harmonious coexistence, as the image of a global village might suggest. Rather, he argued that it would bring about greater conflict and even war. In addition, McLuhan noted that those most attuned to the emergence of a global village are advertising and public relations communities, with commercial interests in mind. Still, electronic media hold out the hope that people can begin to identify with a collectivity that had previously been conceived only in theoretical terms: humanity as a whole. If McLuhan were alive today, he would no doubt see the Internet as an additional step along that path.



Marshall McLuhan (1911–1980).

SOURCE: Josephine Smith, Marshall McLuhan fonds, Library and Archives Canada, accession number 1988-022 NPC, PA-172791.

THE POLITICAL-ECONOMY PERSPECTIVE

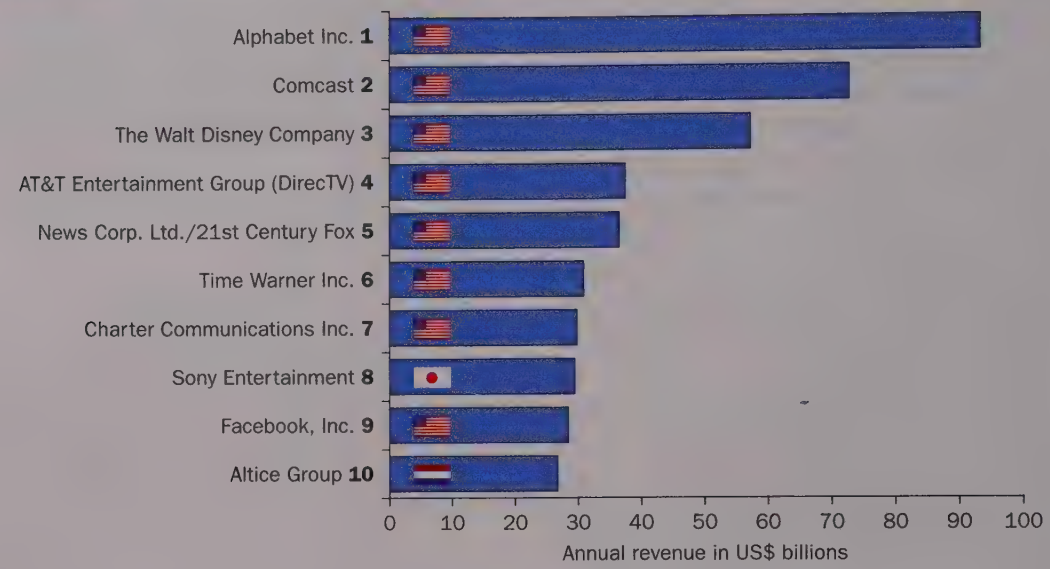
Today, the **political-economy perspective** is the dominant form of media determinism. Proponents of the political-economy perspective are chiefly concerned with how power relations and the pursuit of profit shape (1) media ownership, production, and distribution, and (2) media influence (Mosco, 2009). Let us consider each of these issues in turn.

Concentration of Ownership and Control

In a complex society like ours, members of various classes, ethnic groups, genders, and regions inevitably have somewhat different cultural tastes and definitions of how they can best promote the well-being of themselves and their society. In a truly democratic society, one would expect the mass media to reflect diverse interests in news reporting and entertainment programming. Yet, as proponents of the political-economy approach argue, the media tend to serve the interests of their corporate owners and their political and business allies (Herman and Chomsky, 1988; McChesney, 2008).

From this point of view, too much media concentration is a danger signal. **Media concentration** refers to the process by which fewer and fewer companies control the mass media over time as smaller and less efficient companies go out of business or get bought up by bigger and more efficient companies (Straw, Gabriele, and Wagman, 2011). Media concentration can be limited by government policy that supports a large, publicly funded broadcaster such as the CBC and sets rules ensuring that the mass media express a wide diversity of viewpoints and do not become concentrated beyond a certain level. However, the opposite tendency has been evident in Canadian government policy since the 1980s. Successive federal governments have loosened media regulation and cut funding to the CBC. They have thus contributed to mergers and acquisitions through which privately owned media companies have expanded in size and shrunk in number.

FIGURE 6.1 The 10 Largest Media Corporations in the World, 2016


Alphabet Inc. 1
Comcast 2
The Walt Disney Company 3
AT&T Entertainment Group (DirecTV) 4
News Corp. Ltd./21st Century Fox 5
Time Warner Inc. 6
Charter Communications Inc. 7
Sony Entertainment 8
Facebook, Inc. 9
Altice Group 10
0 10 20 30 40 50 60 70 80 90 100
Annual revenue in US$ billions

Note: Revenue converted from euros to U.S. dollars.

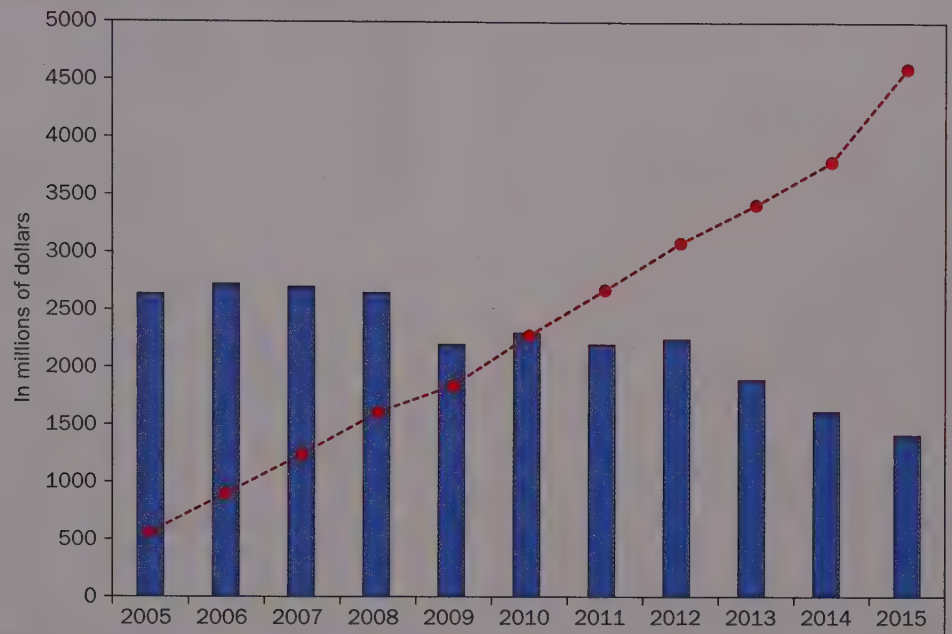
SOURCE: Institute of Media and Communications Policy.

The Canadian story is different only in scale from the global scene, where a handful of global multimedia titans have emerged in recent decades (Hesmondalgh, 2013).

The Institute of Media and Communications Policy ranks the largest media companies every year (see Figure 6.1). In 2016, eight of the ten largest media companies were American. These megacorporations own and control multiple media industries. For example, News Corp. 21st Century Fox, headquartered in New York, was ranked fifth, with annual revenue of more than C$45.1 billion. It operated broadcast television stations and produced and licensed television programming in the United States, Canada, Europe, Asia, and Latin America. It also produced, acquired, and distributed motion pictures worldwide. Through News Corp, it published newspapers and books, provided information services, and operated the Fox News Channel. Its main shareholder was billionaire Rupert Murdoch. Many media scholars have criticized Fox News for failing to live up to its claim of being "fair and balanced." They claim that Fox News promotes a right-wing political agenda in its news coverage and commentary that strongly favours white, well-to-do Americans at the expense of everyone else (Straw, Gabriele, and Wagman, 2011). In 2019, 21st Century Fox was bought by Disney, further increasing the concentration of ownership of major media corporations.

In most countries, a second tier of national companies controls a large part of media production and distribution (Herman and McChesney, 1997: 53). Canada is a case in point. A recent report revealed that Canada's media industry is one of the most highly concentrated among comparable countries. The broadcasting sector is dominated by five broadcasting and telecommunications companies that control 82 percent of industry revenues: Bell Canada, Quebecor, Rogers, Telus, and Shaw (Fry, 2017: 53). Canada's news industry is highly concentrated as well (Skinner and Gasher, 2005). A series of mergers, takeovers, and closures resulted in just three main companies—Postmedia, Torstar, and Transcontinental—owning nearly 66 percent of the country's 102 daily newspapers and 35 percent of the country's 1060 community newspapers (Fry, 2017: 58). The Postmedia/Sun Media merger in 2014 gave Postmedia a virtual monopoly of the English-language newspaper market in many of the country's major cities. The company now controls 15 of the 21 major English-language dailies, including the *National Post* (Fry, 2017).

FIGURE 6.2 Advertising Revenue for Canada's Daily Newspapers and the Internet, 2005–15



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Dailies	2659	2745	2722	2670	2216	2316	2216	2261	1909	1630	1424
Internet	562	901	1243	1609	1845	2279	2674	3085	3418	3793	4604

SOURCE: H. Fry. (2017). "Disruption: Change and Churning in Canada's Media Landscape." *Report of the Standing Committee on Canadian Heritage*. Ottawa: House of Commons Canada.

Concentration of the newspaper industry is an area of special concern for media analysts because newspapers, including their digital editions, provide important information about current events, politics, the economy, education, and other issues that concern the public. A healthy democracy requires that newspapers vigorously express diverse viewpoints, not homogenize public opinion. However, the newspaper industry is facing many challenges as people increasingly turn to the Internet for their news and advertising migrates to digital media. Dealing with fewer subscriptions and declining advertising revenues, newspapers have had to innovate by providing digital versions that subscribers can access on their tablets (see Figure 6.2). The industry has also had to reduce staff and therefore reporting, and turn to mergers to maintain profitability.

Corporate Integration

In their quest to dominate markets, large media companies pursue two key strategies: conglomeration and vertical integration (Hesmondalgh, 2013). **Conglomeration** involves the acquisition by one company of other companies in similar or related fields. For example, in Canada, Rogers owns the Rogers Centre and the Toronto Blue Jays. It promotes the Blue Jays on its sports radio stations and television channels. Rogers has also acquired a controlling stake in the rights to broadcast NHL games in Canada and developed an app that streams NHL games to smartphones and other wireless devices. It sells smartphones online and in its retail outlets. It owns *Maclean's*, *Chatelaine*, and about seven dozen other magazines, where it advertises its increased capability under the slogan, "Hockey's New Home"—placing Rogers at the centre of Canadian social and cultural life. Rogers magnifies its ability to sell product by integrating a wide range of companies across many related industries, including professional sports, cable television, cellular telecommunication, retailing, and print media. Each branch promotes the others, making the whole richer than its parts would be under separate ownership.

Vertical integration occurs when a corporation controls resources at different stages of production and distribution within a particular industry. The

Walt Disney Company, for instance, owns businesses specializing in media content, including Touchstone Pictures and Pixar Animation Studios, which produce live-action and animated motion pictures. At the same time, Disney owns international television networks and film distribution companies that circulate films worldwide (Hesmondalgh, 2013). Farther down the chain, the Disney Store offers a retail environment in which consumers can purchase products inspired by characters in Disney films, and Disney's theme parks invite people to experience its "magical" worlds. Through vertical integration, Disney can ensure that its movies are widely distributed and that the Disney experience is extended through toys and travel to maximize profits.

Cultural Imperialism or Global Cultural Flows?

According to some researchers working in the political-economy tradition of media research, the global domination of the mass media by large, "top-tier," mainly United States-based companies, amounts to **cultural imperialism**—the imposition of American culture and values on almost everyone worldwide (Schiller, 1976; see also Herman and McChesney, 1997). In this view, media such as animated films or television shows are "able to cross boundaries and literally invade cultures in ways that bodies cannot" (Sturken and Cartwright, 2009: 397).

While American media products are undoubtedly popular worldwide, critics of the cultural imperialism thesis emphasize four countertrends. First, non-American competitors abound. For instance, "Bollywood"—the Indian film industry based in Mumbai—produces more films per year than Hollywood does and distributes its products throughout Asia and to Indian communities in North America and Europe (Sturken and Cartwright, 2009). Films produced in "Nollywood"—the Nigerian film industry—are also popular throughout Africa.

A second countertrend involves the degree to which audiences outside the United States adapt and change American cultural products to reflect local conditions and cultures (Gillespie, 1995; Robertson, 1995). This process, sometimes called *indigenization* or *glocalization*, is especially evident in the transformation of inner-city American hip-hop into a musical form that expresses the anger of First Nations youth in Canada, pro-democracy youth in Senegal and Tunisia, and so on.

Third, foreign sources influence American mass media, reversing the process identified by the cultural imperialism thesis. The popular television series, *The Good Doctor*, was adapted from a South Korean television series and *Homeland* was adapted from an Israeli television series.

Fourth, governments, particularly in France and Canada, have sought with some success to constrain the influence of the American mass media through the regulation of local media industries (see the Critical Sociology feature, Government Intervention in Canadian Media Industries).

Mention of official policy ought to remind us that the governments of some countries control the mass media so tightly that cultural imperialism on the part of giant transnational capitalist enterprises is barely noticeable. Strong state control of television and the Internet in Russia, China, Cuba, and Iran, for example, makes the Canadian and American media markets seem like the Wild West in terms of diversity and competitiveness. All four of the factors just listed lead one to question the force with which proponents of the cultural imperialism thesis make their case.

Criticisms of the Political-Economy Tradition

Proponents of the political-economy tradition identify various mechanisms that enable "money and power . . . to filter out the news [that is not] fit to print, marginalize dissent, and allow the government and dominant private interests to get their messages across to the public" (Herman and Chomsky, 2006: 257). For example, Herman and Chomsky's "propaganda model" of the media argued that

1. In the highly competitive mass media environment, noncorporate media that could provide alternative views of the world are marginalized or driven out of business by giant corporations.
2. Advertising constitutes by far the biggest share of news industry revenue, and advertisers support mostly mainstream media whose audiences enjoy substantial buying power and whose messages reinforce business interests.
3. Information sourcing tends to filter out minority viewpoints. Journalists rely heavily on government and corporate public relations offices for information, producing news bias.
4. Governments and corporations often influence public opinion by responding forcefully and negatively to news reports that criticize them.

Critical Sociology

GOVERNMENT INTERVENTION IN CANADIAN MEDIA INDUSTRIES

In Canada, television programming, popular music, movies, and video games are saturated with American product. This raises questions about the influence of American media on Canadian culture and identity. In particular, are Canadians becoming Americanized through the consumption of cultural goods that promote American values and ways of life?

To promote Canadian media and cultural texts, the government of Canada has established various policies, regulatory bodies, and organizations. The Broadcasting Act is based on the idea that broadcasting is "a public service essential to the maintenance and enhancement of national identity and cultural sovereignty." It mandates the Canadian broadcasting system to

> safeguard, enrich and strengthen the cultural, political, social and economic fabric of Canada . . . [and,] through its programming and the employment opportunities arising out of its operations, serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women and children, including equal rights, the linguistic duality and multicultural and multiracial nature of Canadian society and the special place of aboriginal peoples within that society. (Government of Canada, Broadcasting Act, S.C. 1991, c. 11)

The Broadcasting Act is implemented in part by the Canadian Radio-television and Telecommunications Commission (CRTC). The CRTC is an independent public authority responsible for regulating and licensing the broadcasting and telecommunications industry. It also ensures the development of Canadian programming, talent, and perspectives through the establishment of Canadian content guidelines. In television, for instance, the guidelines require that private broadcasters maintain a Canadian content level of 55 percent overall, with 50 percent of prime-time programming (6 p.m. to midnight) dedicated to Canadian shows (CRTC, 1999, 2011).

Private broadcasters have been able to fill the requirements with news programming, low-budget dramas, and, more recently, reality television shows like *Big Brother Canada*, especially in off-peak hours. However, the CBC is mandated by the Broadcasting Act to offer a wide range of mainly Canadian programming that is educational, informational, and entertaining. The public broadcaster operates two major television and radio networks in English and French, as well as online services. It provides programming in several Indigenous languages and offers service in the Canadian North.

The CBC is the main stage for original Canadian radio and television programs (Raboy and Taras, 2007: 86). It has featured award-winning entertainment shows such as *Schitt's Creek*, informational newsmagazines, including the consumer advocacy show *Marketplace*, as well as educational children's programming on *CBC Kids*. Because much of its budget comes directly from the federal government, it is not driven solely by commercial imperatives. Rather, it serves the public interest with programming that aims to meet the needs of diverse Canadians. Some observers contend that it is one of the few channels through which citizens can communicate effectively among themselves (Raboy and Taras, 2007).

Yet the CBC's ability to fulfill its mandate has eroded in recent decades because it has suffered several rounds of funding cuts. Station closures, programming changes, and dwindling audiences have followed each cutback. Some analysts even believe the CBC is on the verge of extinction (Raboy and Taras, 2007: 85).

Critical Thinking Questions

1. Do you think that the influence of the American mass media in Canada amounts to cultural imperialism? Why or why not?
2. Should Canadians continue to fund the CBC when other media companies are required to carry Canadian content by the CRTC?

5. News often conforms to the dominant ideals and beliefs of a society, limiting what can be said about topics such as terrorism.

Through these filters, news media produce a political bias and operate as a form of propaganda in democratic society, manufacturing consent for the status quo. Herman and Chomsky argue that the manufacture of consent involves, first, getting members of educated elite groups (those who read *The New York Times*, for instance) on board with the messages published by the news. In turn, educated elite members spread these ideas to the masses through universities, the mass media, and so on.

Do such mechanisms entirely homogenize the news and render it consistently pro-business and pro-government? Certainly not in all respects. Pick up a

major newspaper or listen to the nightly television news and you will find plenty of stories about government corruption, ineffective public policy, and corporate wrongdoing. Journalists and other media workers influence what gets published, and they are often critical of authority. In recent years, the Canadian public has not exactly been kept in the dark about the environmental dangers of the tar sands, the shocking behaviour of an MP involved in a sexting scandal, the controversial involvement of the Canadian military in Afghanistan and Iraq, and myriad other issues. It is true, as proponents of the political-economy tradition say, that news reports almost never question Canadians' core beliefs in the virtues of capitalism, democracy, and consumerism as a way of life. But short of consensus on such core values, there is plenty of controversy and much criticism of the status quo in the mass media.

A second important criticism of the political-economy perspective concerns its view of the typical audience member as something like an automaton passively absorbing whatever information governments and corporations feed it, in support of the status quo (Horkheimer and Adorno, 2006 [1944]). I know few people who uncritically accept everything they see and hear in the mass media, and I bet you don't know many such people either. In general, audience members are a lot more independent-minded than proponents of the political-economy tradition make them appear. To fully appreciate this fact, we next investigate interpretations of media influence that are more voluntaristic than the political-economy approach is.

VOLUNTARISTIC THEORIES OF MEDIA INFLUENCE

CULTURAL STUDIES

Cultural studies constitute an interdisciplinary field of study, the main goal of which is to analyze culture's relationship to social power (Hesmondalgh, 2013: 51). Parallels exist between cultural studies and the symbolic interactionist perspective discussed in Chapter 1, insofar as both are concerned with how people create cultural meaning.

Media Representation

A central concept in cultural studies is **representation**, the use of signs for the purpose of conveying meaning. According to analysts working in this school of thought, people produce meaningful communication by employing signs to represent objects, people, events, and ideas (Hall, 2013: 14). Media representations are selective and evaluative; they include and emphasize some objects, people, events, and ideas while excluding and de-emphasizing others. They thus form "interpretive frames" that allow us to make sense of the world, including the way we understand our place and the place of others in it (Hjarvard, 2013: 37). Erving Goffman (1974), a Canadian sociologist who worked in the symbolic interactionist tradition, developed the notion of "frame analysis" to capture how such frames work in everyday life. He suggested that frames are cultural lenses through which we perceive reality and make sense of things and events. They thereby influence our behaviour. In Goffman's scheme, the media engage in a process of "intentional framing" whereby frames are constructed to represent particular aspects of reality.

For example, many of us know something about Paris and have an idea of what it looks like, even though we may have never visited the city. Our knowledge of Paris is gained through documentaries, fictional films, newscasts, and magazine articles. These media products provide us with interpretive frames—images and stories—that depict Paris in a certain way, emphasizing qualities such as its historical charm or fashionableness. How many of us think of Paris as a "city of love" because of the way it has been represented in popular films such as *Midnight in Paris* (2011) or *Amélie* (2001)? Paris has become a honeymoon destination partly due to its framing by the media.

Media representations also help us to make sense of masculinity and femininity, gender relations, and sexuality. Films, television shows, and advertisements depict men and women in particular roles and associate masculinity and femininity with specific characteristics. Think of how Axe deodorant commercials convey masculinity: heterosexual, young, white, cool, irresistible to beautiful women, and always in control. The "Axe Effect" advertising campaign features women in meagre attire seduced by the power of Axe and the men who use it. The campaign thus reinforces norms surrounding gender and sexual relations. In general, ads perpetuate commonsense ideas about the way things are and the way they should be—concerning not just gender, but also class, race, family, and so on.

Cultural studies analysts pay much attention to dominant ideologies, that is, the widely shared values and beliefs that support the interests and social

position of powerful categories of the population (O'Shaughnessy and Stadler, 2012: 194). They argue that social inequalities are maintained partly through the production and circulation of values and beliefs that make unequal power relations appear perfectly natural, not socially constructed. For instance, some media scholars argue that widespread media depictions of women as sex objects, domestic and maternal service providers, and damsels in distress help to maintain women's subordinate position in society. The former representation is certainly evident in the "Axe Effect" ads, where women play secondary roles as sex objects for male pleasure while men activate women's desires and thus control them by dousing themselves in Axe body spray (see the Critical Sociology feature, Advertising and Identity).

THE MEDIA AND DISCOURSES

According to Michael Foucault, media images, ideas, and texts form discourses. Foucault defines a **discourse** as "a body of knowledge that both defines and limits what can be said about something" in a particular historical and social context (Sturken and Cartwright, 2009: 105). It is a *system* of representation that provides a certain way of understanding a topic such as criminality or sexuality and informs how those ideas are put into practice (Hall, 2013: 29). For

Critical Sociology — ADVERTISING AND IDENTITY

People continually rummage the world of consumer goods for ideas of what it means to be a man or a woman, to be Canadian, or to be middle aged—in short, for meanings that they can use to construct and convey their identities (McCracken, 2005: 165). Advertising images are important cultural resources for such identity work. Advertising can be understood as "a system of sign value production" that works to create value and meaning for goods, especially brands, in consumer markets (Goldman and Papson, 1998: 24). It involves the creative deployment of existing signs to establish new meanings within the framework of an ad. For instance, Nike ads have used the images of LeBron James and Spike Lee to equate the Nike brand with James's athletic prowess and Lee's association with hip, urban black culture.

In the process of creating sign value, advertisements convey meanings about a range of things besides just the product or brand, including meanings about family, community, and identity. They do this by presenting an image of the good or brand and by suggesting how it can help individuals realize their desires to be a certain kind of person, to live a particular lifestyle, or to belong to a specific community, such as basketball players.

Advertisements also call on viewers to create meaning by decoding or interpreting it. In this process, the ad attempts to hail us; it invites us to take a position in relation to the ad and share in its ideology. For example, the Dove Campaign for Real Beauty portrays women of different shapes, sizes, ages, and skin colour using Dove soap to create the idea that Dove is a socially progressive brand. The progressive quality of the brand is linked to its critique of dominant media representations of beauty as thin, young, and predominantly white. Instead, it posits alternative, feminist frames for understanding the diverse forms of beauty and promotes body acceptance. Viewers are invited to identify with Dove's ideological critique and assert a feminist identity by consuming Dove products. Of course, the campaign has been criticized for continuing to promote the idea that women still need to be beautiful and for appropriating feminist ideas for commercial gain (Taylor, Johnston, and Whitehead, 2016).

In this manner, advertisements help to construct people's sense of gender, race, ethnicity, age, and so on. They not only offer us representations of various social categories and convey meanings about femininity, skin colour, old age, and so on; they also encourage us to identify with the positions offered in their narratives and to integrate them into our own self-concepts (and ideally, to perform our identities using the products they advertise). This does not mean that audiences are automatically recruited by advertisements. Not everyone will identify with the position that is offered in the narrative or want the things that are on display. However, many are persuaded. Billions are spent on advertising because it works.

Critical Thinking Questions

1. Does socially progressive advertising work just to sell more product or does it have a broader impact on society?
2. Why do we look to advertising for meanings that we can use to construct and perform our identities?

Foucault, discourses are also linked to power insofar as they are way of regulating conduct.

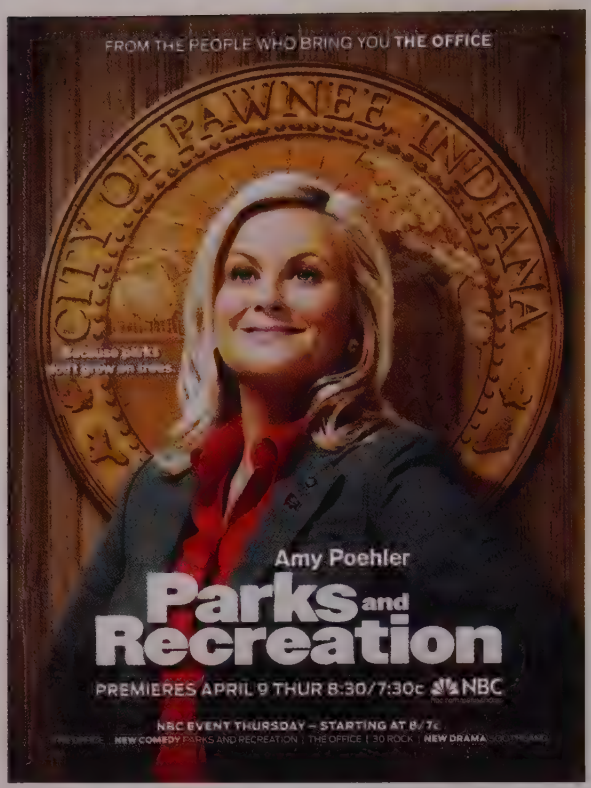
For instance, Edward Said (1978) observed how a discourse of **Orientalism**—a Western approach to understanding and talking about Eastern and Middle Eastern cultures—emerged historically through Western scholarship, literature, and photographs of the East. These representations involved the production of knowledge that supported Western authority over the region. Orientalist discourse exaggerates the differences between West and East, producing narrow stereotypes of Eastern and Middle Eastern cultures as traditional, irrational, and exotic—and therefore strange and foreign. Many of the images we see in Hollywood films and mainstream news media today reinforce Orientalist discourse. For example, in the Disney movie *Aladdin* (1992), Middle Eastern cultures are depicted in stereotypical fashion as barbaric (in the opening song), sensual (belly dancers), and exotic (strange and mysterious). Still, one must keep in mind that discourses can change over time.

Conflicting Frames

Significantly, cultural studies analysts argue that the mass media provides audiences with dominant interpretive frames *and* interpretive frames that are at odds with dominant representations. In admitting the existence of competing frames, they are less deterministic than are researchers operating in the political-economy tradition; they allow that audience members have the capacity to choose interpretive frames that do not support existing power relations.

Consider in this connection the role of Leslie Knope (played by Amy Poehler) in the television comedy series, *Parks and Recreation*. She often challenges dominant conceptions of gender roles by associating women with intelligence, prestigious occupations, and political clout. In one episode, Knope is elected to city council, whereupon she promptly installs in her office a gallery of photos of smart, powerful women—including herself. She calls it her "wall of inspirational women" (Madrid, 2014). As this example suggests, and as cultural studies analysts emphasize, the mass media are properly understood as sites of struggle over cultural meanings.

Contested notions of what constitutes "Canadianness" further illustrate this struggle. Media representations often portray members of dominant ethnic groups (white people of British or French origin) as true Canadians, while rendering members of minority groups as somehow less Canadian


FROM THE PEOPLE WHO BRING YOU THE OFFICE
CITY OF PAWNEE INDIANA
Amy Poehler
Parks and Recreation
PREMIERES APRIL 9 THUR 8:30/7:30c NBC
NBC EVENT THURSDAY – STARTING AT 8/7c
NEW COMEDY PARKS AND RECREATION | THE OFFICE | 30 ROCK | NEW DRAMA

Parks and Recreation's Leslie Knope.
SOURCE: © AF archive/Alamy.

and therefore socially inferior. Thus, sociologists analyzing Canadian television programming have found that minority-group members are underrepresented as winners in reality television contests and in lead roles in prime-time dramas, and are typically portrayed in stereotypical ways (Byers, 2008; Fleras, 2003; Fleras and Kunz, 2001).

Nonetheless, depictions of Canadian minority groups are changing. It is no longer unusual to see the news read by black, Chinese, or Indo-Canadians. Korean Canadians play leading roles in *Kim's Convenience* and the show features stories that centre on the experiences of an immigrant family. Meanwhile, media outlets catering to ethnic minority groups are on the rise. As early as 1981, the Inuit Broadcasting Corporation was established to serve audiences in Inuktitut. The Aboriginal Peoples Television Network was founded in 1999. Based in Winnipeg, it broadcasts and co-produces programs in multiple languages for, by, and about Indigenous peoples: news broadcasts, dramas, documentaries, and children's programs. It serves as a showcase for Indigenous media, culture, and talent (Roth, 2014). The growth of minority-group media outlets and the increasing representation of minority-group members

in important roles in the mainstream media in Canada reinforce minority-group identities and elevate their status in the public's mind.

RECEPTION ANALYSIS

One of the key ideas in cultural studies is that media representations give audiences the opportunity to choose between dominant and nondominant interpretations of various aspects of the social world. **Reception analysis**, an offshoot of cultural studies, is even more voluntaristic. Its proponents hold that audience members interact with the mass media creatively, giving rise to all manner of interpretations of media messages.

Stuart Hall (1980) developed the encoding/decoding model of communication based on the idea that producers encode media messages with an intended meaning. Then audience members decode media messages in various ways, many of them unintended. Such variety notwithstanding, decoding takes three main forms. First, audience members may accept the intended meaning. Second, they may negotiate an interpretation of the media message, accepting part of what is intended but adding their own interpretive twist. Third, they may resist or reject the intended meaning altogether. In all cases, audience members bring their own identities, experiences, and cultural associations to their interpretation of the media message. These background factors influence how they make sense of it.

Recent media analysis focuses on the interactive nature of audience engagement with new media, particularly social media. With new media, audience members do not simply receive and interpret media messages that are produced and circulated by media industries. Rather, they modify, create, and recirculate those messages. Online news articles invite reader comments. YouTube users modify and create new videos for others to watch. Facebook relies on each member to generate content by creating a user profile, uploading photos, and circulating messages to relatives, friends, and acquaintances. Audience members thus become consumers and producers of media messages, blurring the distinction between these two previously divorced roles (Ritzer, Dean, and Jurgenson, 2012). This idea is captured in the notion of the "prosumer." Some analysts contend that media companies exploit audience members by encouraging them to produce media messages for free (Arvidsson, 2006). However, their work is by no means completely controlled by media companies. Instead, social media give audience members the opportunity to become creatively involved in production in a way that was impossible before the twenty-first century (Hesmondalgh, 2013).

TIME FOR REVIEW

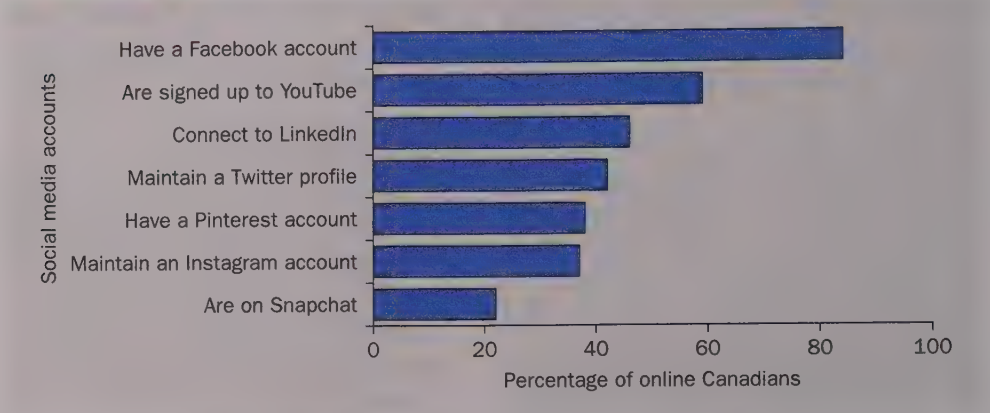
1. What is media concentration? Why is it a major concern according to media analysts operating in the political-economy tradition?
2. According to the propaganda model, what are the main mechanisms that allow rich and powerful interests to shape the news in ways that suit them?
3. What are media representations and how do they operate?
4. According to reception studies, how do audiences engage with media messages?
5. In what sense do social media blur the distinction between the producer and the consumer of media messages?
6. In what sense are the various theories of media influence deterministic or voluntaristic?

SOCIAL MEDIA

The past decade has witnessed tremendous growth in social media. Facebook, Twitter, and Instagram are now integrated into our daily lives and routines, shaping how we connect with others, share information, and make plans. We follow fitness and fashion influencers on Instagram, find dates using online dating services, run food blogs, and join online gaming communities (Dewing, 2010; Kaplan and Haenlein, 2010). The Internet used to allow people to "surf" and consume media content produced by others. Now it encourages people to create media content, interact, learn collaboratively, network, and harness collective intelligence (Flew and Smith, 2011: 20). Figure 6.3 shows just how actively engaged Canadians are with social media.

Much optimism greeted the rise of social media because they multiply our capabilities and shift control over the production and circulation of media messages away from large corporations and into the hands of the masses. However, social media are paradoxical. While they facilitate new ways of connecting, communicating, and creating, they are also bound up with new forms of commodification, surveillance, and control (Werbin, 2014). In what follows, we explore both the potential and the limitations of social media.

FIGURE 6.3 Social Media Use among Online Canadian Adults



SOURCE: Anatoliy Gruzd, Jenna Jacobson, Philip Mai, Elizabeth Dubois. (2018). *The State of Social Media in Canada, 2017.* Version: 1.0. Ryerson University Social Media Lab. DOI:10.5683/SP/AL8Z6R.

SOCIAL MEDIA'S POTENTIAL

Democratization is one important benefit of social media. It is a consequence of their interactive, decentralized nature. Consider blogs, which allow just about anyone to write entries on any subject for others to read and comment on in a sort of informal journal. Blogs usually contain links to articles, videos, and photos, and are featured on websites such as Facebook and Buzzflash. The startup and maintenance costs of a blog are negligible compared to the cost of starting and running a newspaper. Blogs thus allow many people to publish information on a wide range of topics that reflect diverse viewpoints that are unlikely to be published by mainstream media. Travel blogs offer frank reviews of hotels by people who have stayed in them. Local news blogs report on issues that established newspapers might not consider newsworthy. Political blogs espouse opinions too radical (conservative or left-wing) for established mass media to touch (Greenberg and Gilberds, 2011; Lievrouw, 2011).

A second benefit of social media is that they afford new ways of connecting to other people. They encourage the strengthening of existing social networks and the development of new ties that may bridge otherwise unconnected networks (Hampton, 2010). Such bridging ties provide access to information such as job postings on LinkedIn or funding for independent films via crowd-sourcing campaigns.

Third, social media play an important role in contemporary social activism by creating awareness of various causes and helping to mobilize support for political action (Harlow, 2011; Vegh, 2003). Awareness is generated through the creation and circulation of information on social media by organizations like Greenpeace and movements such as #MeToo. Information can spread quickly and extensively through interlinked online networks. Many social movements therefore maintain Twitter accounts and Facebook pages to share information and mobilize followers for online and offline collective action. For instance, the Black Lives Matter movement started in 2013 with a Facebook post by Alicia Garza that was shared by her friends using the hashtag #blacklivesmatter. Using Tumblr and Twitter accounts, Garza joined with activists to promote stories to ever-larger networks of people concerned with the social injustices experienced by black people in the United States (Day, 2015).

The movement grew quickly, supporting various campaigns, marches, and activism such as the "Freedom Ride" to Ferguson, Missouri, to protest the police shooting of Michael Brown, an unarmed black teenager. Social media not only contributed to the movement's initial momentum but has helped maintain interest and ongoing involvement. The Black Lives Matter Facebook page now has over 333 000 followers and is linked to an official website where ideas, images, and actions are shared. The movement also has a strong presence on Twitter, Tumblr, and Instagram, through which it maintains connections with followers and encourages people to support the movement by volunteering, endorsing, and donating.

THE DOWNSIDE OF SOCIAL MEDIA

Despite its many benefits, the democratic potential of social media is limited in a number of ways. Foremost among them is the so-called **digital divide**. Although it may seem like everyone uses some form of social media, access is far from universal. Young people living in cities are most likely to have access to social media, especially if they enjoy higher education and high income (Brodock, 2010). From this point of view, and to the degree that being disconnected means being disenfranchised, some people—those who are less educated, poorer, older, and living in rural areas—are deprived of their democratic rights.

Second, while social media allow us to connect with many people, not all connections are beneficial. Interactions with others on social media may be fraught with tension, involve deception, and can even be harmful, as is the case of cyber-bullying. For instance, scholars have documented a rise in gendered cyber-hate and cyber-harassment on the Internet, especially within tech and gamer communities (Jane, 2016). Cyber-harassment in particular involves "profanity, cruelty and threats of violence that would be unacceptable and/or illegal in offline contexts" (Jane, 2016: 292). Women who experience such treatment often suffer psychologically, professionally and financially. Their voices are silenced, they engage in self-censorship, and they are discouraged from participating fully in tech communities and the gaming industry.

A third downside of social media is that they are subject to concentration and commercialization. Like the traditional media, social media are dominated by large corporations such as Google and Facebook. Much of the revenue for both companies derives from online advertising.

Social media generate tremendous amounts of user data that are mined, organized, packaged, and sold to advertising and marketing companies. Some of this information comes from user profiles, some from user behaviour—online buying habits, site visits, ad views, and so on. This information yields a snapshot (more accurately, a movie) of our tastes and interests that social media giants turn into a commodity and sell to advertisers and marketers who use it to target audiences with their messages. The ads that run alongside your Facebook page represent the cost of your seemingly free use of Facebook. People consent to supplying such information when they sign up to use a social media service but they rarely read the company's privacy policy to find out exactly what information is being handed over and how it is used. People can limit the amount of information they supply, but doing so can be a complex and time-consuming process, so they often do not bother to specify limits (de Souza e Silva and Frith, 2012).

The involvement of social media in the capture and commodification of user data raises a surveillance issue, too. **Surveillance** involves authorities, organizations, businesses, and individuals paying sustained and often systematic attention to people's personal details and behaviour, typically to influence, manage, protect, or suppress them (Flew and Smith, 2011: 231).

Social media permit top–down and bottom–up surveillance. Bottom–up surveillance involves friends, acquaintances, or strangers observing us on social media. For example, our Facebook "friends" and Twitter followers can see our status updates, photos, and the information on our profiles, which we tailor to present particular versions of our selves (Utz, 2010). Members of our social network comment and provide feedback on our posts, links, and "likes." Knowing that we are constantly watched, we monitor ourselves; we manage our online presence with a view to the norms and expectations of friends, family, and others who might see us (Turkle, 2011).

Top–down surveillance involves businesses and other powerful social institutions recording our activities and characteristics for commercial or political purposes. Mobile social media take this a step farther by using the global positioning system (GPS) to track people's movements and activities offline (Kaplan 2012: 131). For example, Foursquare collects location data and sells it to advertisers who can then send out location-based advertising. That is why someone with an app linked to Foursquare might suddenly receive an offer for a free coffee from a nearby café (de Souza e Silva and Frith, 2012).

The police access videos on YouTube to conduct criminal investigations. Employers access profiles on Facebook to screen potential candidates and track employee behaviour. Parents follow their children using MamaBear, a location-based app. In the United States, the National Security Agency uses a surveillance system called PRISM to collect user data in real time from Google, Apple, Facebook, Yahoo!, Microsoft, and other social media companies. These data (information on emails, video and voice chats, file transfers, and more) are used to identify potential threats to the United States and may be used for

other, secret purposes. We just don't know. We do know that the CIA gave a company called Palantir US$5.1 billion to develop methods of combining databases for improved surveillance. Palantir has been under scrutiny for civil rights violations (Greenberg, 2013). The idea that we are being watched by individuals, businesses, employers, and governments necessarily influences what we say and do on social media. Therefore, surveillance can have the effect of limiting our freedom of action and of expression (Werbin, 2014: 272).

THE HARD ANSWER

Proponents of the political-economy approach make a valid point when they claim that large media enterprises tend strongly to support core societal values. The news media giants do so by marginalizing alternative voices, respecting the interests of big advertisers, and relying heavily on official news sources. By responding forcefully to critical news reports, governments and corporations reinforce the core societal values propounded by the media giants.

Political-economy analysts are on shakier ground when it comes to the mass media's treatment of non-core issues, where we find lively controversy and debate. Moreover, the political-economy tradition tends to be overly deterministic in its assessment of audiences, which it regards as little more than assemblies of puppets responding to jerks of the puppet-master's strings.

The field of cultural studies provides a more realistic assessment of the interaction between the mass media and their audiences. Cultural studies analysts agree that media representations tend to be biased in favour of dominant economic, political, ethnic, racial, and gender groups. But, importantly, they allow that alternative representations also exist, competing with dominant representations for the attention of audience members. **Media literacy** involves learning to identify the source, target, and intended purpose of a media message.

Still more voluntaristic are reception analysts, who focus on the way media producers encode media messages with intended meaning, only to have audience members, influenced by the idiosyncrasies of their identity, experience, and culture, decode those messages in various ways, many unintended. Accordingly, some audience members accept intended meanings, others reject them, while still others change them in ways that are sometimes difficult to predict. Media analysts strengthen the case for audience autonomy by paying careful attention to the interactive and creative opportunities introduced by social media, which blur the line between media consumer and media producer. At the same time, these analysts are by no means blind to the dark underside of social media, including its potential abuse by data miners and surveillance experts.

Based on this assessment, we may agree that the mass media help us to define who we are as individuals and as members of a range of collectivities. But we must quickly add that ordinary people like you and me play an increasingly active and creative role in generating meaning while modifying and resisting the messages delivered by powerful media interests in a complex interactive process that sociologists continue eagerly to explore.

TIME FOR REVIEW

1. What are social media?
2. What are the main benefits of social media?
3. What are the main disadvantages of social media?

SUMMARY

1. **What are the mass media and why do they matter?**
   The mass media use industrial technologies to enable communication between media companies and large audiences, and among individuals. They are industries that are influenced by commercial interests and the profit motive. In their communications and business roles, the mass media help to shape beliefs, values, and culture.

2. **What is the difference between traditional mass media and new media?**
   Traditional mass media include newspapers, radio, and television. They were designed to reach mass audiences using a broadcast model of communication that transmits standardized information from single sources to many audience members. New media include Internet and Internet-based technologies and platforms,

including social media. New media are based on a "many-to-many" model of communications. They circulate digitized niche content to fragmented audiences. They are interactive insofar as they invite audience members to participate in their creation, modification, and retransmission. They thus blur the line between producers and consumers of mass media products.

3. **What are the main approaches to understanding the influence of the mass media?** There are three major approaches to understanding the mass media. In order from the most deterministic to the most voluntaristic, they are (a) the political-economy approach (which analyzes how large media corporations use their power to shape people's ideas in support of the core values of capitalism, democracy, and consumerism); (b) the cultural studies approach (which analyzes the effects of media representations on audience members and recognizes that dominant and alternative representations compete for audience attention); and (c) the reception analysis approach (which analyzes audience interaction with media messages and emphasizes the creativity of audience members in interpreting media messages).

4. **What is the democratic potential of social media, and how is this potential limited?** Optimists argue that social media hold tremendous democratic potential insofar as they are interactive and networked. Interactivity allows ordinary people to be involved in the production and circulation of media, shifting control away from large corporations and into the hands of the masses. Networking enables people to share information, collaborate in media production, and engage in social activism. However, the democratic potential of social media is limited by the digital divide, hurtful or harmful online interaction, commercialization, and surveillance.

QUESTIONS TO CONSIDER

1. Apply what you have learned about media representation by undertaking a gender analysis of a reality television show, such as *The Bachelor*. How does the show represent masculinity and femininity? In what ways does it challenge or reproduce dominant or alternative gender ideologies?
2. How do individuals contribute to the creation of new media content? To what degree are they creative and autonomous producers of media?
3. Social media use involves a tradeoff; we supply information to companies in exchange for the free use of social media platforms. Do you think this tradeoff is acceptable? Why or why not?

GLOSSARY

Communication (p. 125) involves people exchanging meaningful information using signs or representations of things, people, events, and ideas.

Conglomeration (p. 131) denotes the amalgamation of separate companies into a single corporate entity.

Cultural imperialism (p. 132) involves the process of Western (mainly American) media conglomerates circulating and imposing Western culture and values throughout the world via media products and texts.

The **digital divide** (p. 139) refers to inequalities in access to the Internet and new media. It encompasses divisions in terms of access, activity, and know-how.

Discourse (p. 135) refers to a body of knowledge that establishes the parameters for what we can say about a particular topic in a given historical and social context. Discourses involve the production of knowledge linked to power.

An **imagined community** (p. 127) is a social world composed of members who do not necessarily know each other or meet in person yet consider themselves part of that social world.

Mass media (p. 125) are technology-driven and usually profit-driven methods of communicating meaningful information between one source and many recipients or between many sources and many recipients.

Media concentration (p. 129) denotes the process whereby the ownership and control of media becomes more centralized.

Media determinism (p. 128) holds that people are programmed to buy, aspire, envy, vote, eat, dress, dance, protest, and love in ways that suit those who control the mass media and entice us with their ideals of the good life.

Media literacy (p. 140) involves being able to critically understand the content of messages and the contexts of their production: who initiates messages, for which audiences, and with what purpose.

Media voluntarism (p. 128) holds that ordinary people decide who they are and which imagined communities they will join, the mass media merely offering them an inviting menu of options almost without end.

Orientalism (p. 136) is a Western approach to understanding Eastern and Middle Eastern cultures that characterizes the latter as exotic, traditional, barbaric, and the like.

Proponents of the **political-economy perspective** (p. 129) are chiefly concerned with how power relations and the pursuit of profit shape (1) media ownership, production, and distribution, and (2) media influence.

Proponents of **reception analysis** (p. 137) hold that audience members interact with the mass media creatively, giving rise to all manner of interpretations of media messages.

In media studies, **representation** (p. 134) involves the use of signs that refer to objects, people, and events in the material world; imaginary objects, people, and events; and abstract ideas.

Surveillance (p. 139) involves authorities, organizations, businesses, or individuals paying sustained and often systematic attention to people's personal details and behaviour, typically to influence, manage, protect, or suppress them.

Vertical integration (p. 131) occurs when a corporation controls resources at different stages of production and distribution in a particular industry.

Virtual communities (p. 128) are communities based on shared interests. They exist on the Internet and in the minds of their members.

PART 3

INEQUALITY

Illustrated by Aaron Millard.

CHAPTER 7

SOCIAL STRATIFICATION

Michelle Maroto and Harvey Krahn UNIVERSITY OF ALBERTA

Joe Bryska/Winnipeg Free Press.

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Explain how persistent patterns of social inequality arise and are maintained in different types of societies.
- Compare and contrast different explanations of the origins and impact of social stratification systems.
- Describe the extent to which income and wealth are unequally distributed in Canada and the factors that underlie the trend toward increased inequality.
- Understand how a person's position in society's stratification system has important consequences for lifestyle and quality of life.

INTRODUCTION

Every day, we're bombarded with news stories from multiple sources. Although reporters don't often use the term, it's pretty easy to find discussions about **social stratification**—persistent patterns of social inequality—in the headlines: "Child poverty up in Canada since 1989" (Alini, 2017); "Maps show homeless camps sprawled across city of Edmonton" (Parsons, 2018); "BC's working poor: Meet the people whose jobs don't pay the bills (Culbert and Sherlock, 2018); "Many University of Saskatchewan students experience food insecurity (MacVicar, 2018); "Almost a third of Canadians 'very stressed about money'" (Maher, 2018). Among these, a CBC story stands out. It reports that 46 percent of Canadians are $200 or less away from financial insolvency (Canadian Press, 2019). How can so many people in a country as rich as Canada be so close to bankruptcy? Is there a connection between their circumstances and headlines like "World's richest 26 billionaires own as much money as 3.8 billion poorest people" (Holland, 2019) and "Canada's richest families own as much wealth as three provinces combined" (Alini, 2018)?

The headlines draw our attention to both extremes of the income and wealth distribution. However, it is also important to consider how the situation differs for various groups of Canadians. Although Canadians across the county experience poverty, the situation is worse for many groups, particularly for Indigenous people living on reserves and in Northern Canada (Savage, 2018). A large number of people living in Nunavut experience food insecurity and a high rate of infant mortality (De Meulemeester, 2018; Fenn, 2018). In 2019, housing conditions were so bad in the Cat Lake First Nation just north of Thunder Bay that a state of emergency had to be declared (Prokopchuk, 2019). Such living conditions are not just the result of isolation (Hutchins, 2018). Stratification research shows that racism and discrimination, rooted in Canada's colonialist history, profoundly affect the lives of Indigenous people on and off reserves.

Visible minority Canadians also experience employment and housing discrimination. One CBC story notes that 16 percent of New Brunswick adults reported instances of racial discrimination (MacKinnon, 2018). An article in the *Toronto Star* highlights results from a study showing that racialized workers in Ontario face a higher rate of unemployment than do white workers, and racialized workers who find employment are disproportionately concentrated in low-wage jobs (Mojtehedzadeh, 2018). Another CBC story notes how police-reported hate crimes reached an all-time high in 2017 with increasing numbers of Jewish, black, and Muslim victims (Rieti, 2018). We have to ask why so much racial and ethnic antipathy exists in a country with a large immigrant population, a country that supposedly champions multiculturalism.

Racialized groups are not the only minority groups that appear in the news. As a contributor to *The Globe and Mail* notes, "When it comes to health care, transphobia persists" (Benaway, 2018). When seeking help at an emergency room, the contributor reports being misgendered and treated with distain by medical professionals. The contributor's experience is corroborated by survey research indicating that 52 percent of trans people treated in Ontario in emergency rooms in 2010 experienced discrimination. The Canadian social stratification story is dire, and "intersectionality," that is, being a member of multiple disadvantaged groups (e.g., black and trans), complicates and often worsens the story.

Although marginalized groups, the unemployed, and the very poor catch our attention, so do the very rich. In 2017, the 100 most highly paid chief executive officers (CEOs) of companies operating in Canada earned an average of $10 million dollars, nearly 200 times more than the $50 759 average earnings of all Canadian workers (MacDonald, 2019a). It's shocking to realize that by 11:33 am on January 2, Canada's top CEOs had already earned more than the average Canadian worker will earn all year! But inequality exists even among CEOs. Women, who comprised only 4 percent of CEOs and 10 percent of top executives in 2017, made 68 cents for every dollar earned by their male colleagues (MacDonald, 2019b).

Some stories discuss ways to deal with stratification, taking different perspectives on what should be done. Take, for instance, attempts to limit panhandling or solicitation. The Safe Streets Act, passed in Ontario in 1999 and in British Columbia in 2004, prohibits "aggressive soliciting" in public places and vehicles (Safe Streets Act, Ontario, 1999; Safe Streets Act, British Columbia, 2004). Although the goal of this legislation was to decrease instances of solicitation and push panhandlers into other types of work, it has led to increased fines for homeless people and various legal challenges. Fines can pile up for panhandlers who have few in any income options. One 59-year-old man in Hamilton owed over $20 000 after accumulating more than 250 tickets (Bennett, 2017).

It seems reasonable to ask whether such laws are really the best way to help homeless people.

Other cities and businesses take a different approach. For instance, a downtown Edmonton cafe chose to give customers the option of adding a small donation to their bills to provide a free coffee or pastry for a vulnerable person who otherwise might resort to panhandling (McMillan, 2018). Is this a better way of dealing with panhandling? Should we be focusing on charity? Or can something more be done? It's always hard to tell which policy approach will be successful, but research in social stratification can give us a good idea of what might work, along with why certain approaches tend to receive more support than others.

The common theme in these different news stories is the existence of groups—the unemployed and low-income workers, Indigenous people, women, and immigrants, for example—that rank lower than others in the social stratification system. A low position in this ranking typically means having little wealth, **power** (the ability to impose one's will on others), and prestige (or esteem). A higher position generally implies the opposite. In this chapter, we begin by discussing how sociologists study social stratification. We then examine theories of social stratification that attempt to explain its origins and impact. The next section focuses on occupational and class structures and material inequality in Canada, and asks whether social inequality has been increasing. The chapter ends with a discussion of some of the consequences of social inequality and what might be done about it.

STRATIFICATION: A CORNERSTONE OF SOCIOLOGY

Sociologists have four basic areas of inquiry. We study social structure, or the way in which society is organized, both formally and informally. We ask questions about social order. What is it that holds together a society comprising individuals with different interests, and when and why does social order break down? Inquiries about social change form a third key area in the discipline. How and why do societies, the institutions and power structures within them, and the values and beliefs held by individual members, change? Finally, sociologists spend a lot of time studying social stratification, the manner in which valued resources—that is, wealth, power, and prestige—are distributed, and the way in which advantages are passed from generation to generation.

Arguably, the study of social stratification is the cornerstone of sociology. Descriptions of social structure that ignore the stratification system are clearly inadequate. Imagine describing Canadian society to someone from another country without referring to some features of stratification. Would the listener really understand our society if she or he did not know that most large corporations are run by men, that the working poor continue to struggle to make ends meet even though the majority of employed Canadians earn a decent living, that First Nations are much more likely than most others to be living in poverty, and that immigrants are doing less well today than they were several decades ago, even though they are better educated?

Furthermore, inequalities in wealth can threaten social stability (the poor resenting the wealthy, for example, and demanding more equality), and inequalities in power can be used to maintain social order. For example, powerful corporations might lobby provincial or territorial governments for changes in the labour laws that would make it more difficult for unions to organize employees. In less democratic countries, high levels of inequality and direct control of the police and military by a powerful political minority can lead to the quick and violent suppression of mass unrest (Ortiz, 2007).

An understanding of social stratification is also essential for studying social change since frequently it is the stratification system that is undergoing change. For example, changing gender roles and the slow movement of women into positions of power and authority in North America in the past few decades are really features of a changing stratification system. The massive social, economic, and political changes that began in the former Soviet Union in the late 1980s and in China a decade earlier are, among other things, changes in stratification systems, as the main sources of power came to include both the political system and the emerging capitalist economy.

SOCIAL HIERARCHIES IN STRATIFIED SOCIETIES

Imagine a society in which stratification did not exist, in which all things of value were distributed equally. Even if you picture a very small group, perhaps a pre-industrial society with only a few hundred members, living on some isolated island where the necessities of

life are easily obtained, it is still difficult to imagine a nonstratified society. A social hierarchy might emerge as a result of skill differences in fishing, in nursing the ill back to health, or in communicating with the spirits, for example. Inequalities in wealth might develop simply because some families were fortunate enough to have a larger number of children, providing more of the labour needed to accumulate valued possessions. Once accumulated wealth began to be passed from generation to generation, a structured and relatively permanent pattern of inequality would emerge.

Perhaps you imagined some contemporary society comprising adults who, believing strongly in equality, decide to live and work together in some kind of urban or rural commune, sharing all their possessions. Again, it is easy to imagine how a social hierarchy could emerge, as those with more useful skills find themselves playing a more central role in this small-scale society. No doubt, when important decisions need to be made, these individuals will be more likely to influence the outcome.

We do not need to repeat this mental exercise too many times before we see that social stratification in one form or another exists in all societies. However, our hypothetical examples are far from typical. In most societies, stratification is pronounced, and basic skills are seldom the foundation of social hierarchies. Nevertheless, cross-cultural variation exists in the criteria by which individuals and groups are ranked, the degree to which they can move from one position to another within the hierarchy, and the extent of inequality in wealth and power that exists within the hierarchy.

ASCRIBED AND ACHIEVED STATUS

Let's begin by defining the rank or position that a person has within a social hierarchy as that person's **status**. We can further distinguish between an **ascribed status** and an **achieved status**. The former is assigned to individuals, typically at birth. An ascribed status can be a function of race, gender, age, and other factors that are not chosen or earned and that cannot be changed (a few people do choose their gender status, but they are exceptions). In contrast, an achieved status is precisely that—a position in a hierarchy that has been achieved by virtue of how well someone performs a role. The most obvious example is that of occupational status—for instance, individuals who have performed well in law school are entitled to become lawyers, and high-performance athletes may strive to achieve the status of professional athlete. By the same logic, someone could achieve the status of homeless person by performing poorly in educational, employment, family, and other social roles.

Although we may accept that a completely nonstratified society is impossible, most of us would probably agree that a stratification system in which higher positions are achieved, not ascribed, is preferable. In a **meritocracy**, everyone would have an equal chance to compete for higher status positions and, presumably, those most capable would be awarded the highest rank. Such a society would exhibit a considerable degree of **social mobility**, as those who are more qualified move up the social hierarchy to replace those who are less competent and are consequently compelled to move down.

OPEN AND CLOSED STRATIFICATION SYSTEMS

When we compare Canada with other societies, or look back at our history, we find that this country has what appears to be a relatively **open stratification system** in which merit, rather than inheritance or ascribed characteristics, determines social rank and in which social change is therefore possible. For example, dramatic changes in the status of various groups have occurred in this country over time. Although slavery was not nearly as widespread in Canada as in the United States, slaves (most of them black and from Africa but also some First Nations) were bought and sold in Canada from the 1630s to the 1830s (Milan and Tran, 2004). Chinese labourers, brought into the country to help build the railways, were kept out of most "white" jobs by law until well into the twentieth century (Li, 1982). Similarly, it was not until the 1960s that black Canadians were allowed to compete for much more than the lowest-level positions in the Canadian railway industry (Calliste, 1987). However, by the 1830s, slavery had disappeared in Canada, and we now have laws prohibiting racial discrimination.

Comparing ourselves to other contemporary societies, we note that Canada does not have an aristocracy, such as the one that exists in Britain, where children of wealthy and powerful families of long standing inherit positions and titles. The degree to which Canadians compete for higher status occupations (in the education system and, later, in the

Ascribed and achieved statuses.

SOURCES: (Left) © Gouhier-Guibbaud-JMP/ABACAPRESS.COM/Newscom; (right) © Ronald Martinez/Getty Images.

workplace) stands in clear contrast to the situation in India, for example, where the caste into which an individual is born largely determines the type of work that he or she will be allowed to do. Although discrimination on the basis of caste membership has been illegal in India for many decades, the **caste system** continues to underpin a relatively **closed stratification system**. Compared with India, Canada offers many more chances for upward social mobility, an indication of a more open stratification system.

It is all too easy, however, to overlook the extent to which ascribed statuses continue to limit opportunities for many Canadians as well. Discrimination against Indigenous people and visible minority groups continues. So, too, does discrimination against members of the gay community, seniors, people with disabilities, and women. These people are in lower status positions not because they competed poorly for some higher ranking in the social hierarchy, but because they are gay, are elderly, have disabilities, or are female.

These are fairly obvious examples of the ways in which ascribed statuses continue to play a prominent role in Canada's social stratification system. But what about the child from a wealthy family who graduates from an excellent high school in a wealthy neighbourhood, completes a degree or two in a prestigious and costly university, and then begins a career in a high-status, well-paying profession? Is this simply an example of someone achieving a deserved high-status position, or did the advantages of birth (an ascribed status) play some part in this success story? Similarly, when we hear of large companies laying off hundreds of workers, does the workers' sudden downward mobility reflect their failure to compete in an open, merit-based stratification system, or were they simply unfortunate enough to be employed in a corporation that was being downsized?

As these examples illustrate, the social stratification system consists of numerous hierarchies, some based on ascribed characteristics, others on achievement. Elsewhere in this book, you will read chapters devoted to various dimensions of stratification, such as gender, race, and ethnicity, and their "intersectionality," or how they sometimes overlap. Other chapters address activities and institutions in which stratification processes are extremely important, and still others focus on inequalities among countries. Once you have read all these chapters, you will, we expect, be convinced of the central importance of social stratification in the discipline of sociology.

SOCIAL CLASS

You will also notice that, even though studies of gender, race, and ethnicity take you in quite different directions, all frequently share an emphasis on inequalities in income, wealth, or property, and on resulting inequalities in power. On average, for the past two decades, women have been earning less than 75 percent of what men earn (Krahn, Hughes, and Lowe, 2020: Ch. 6). Older women are much

more likely than are older men to be living in poverty. Immigrants and, particularly, Indigenous people are more likely to be unemployed or, if they are employed, to be in low-paying jobs. Owners of large workplaces are wealthier than are most other members of society, and employees in professional and managerial occupations typically earn much more than lower-level employees do. Recognizing, then, the extent to which such material inequality (that is, differences in income and wealth or property) parallels and overlaps with other social hierarchies, the rest of this chapter will focus primarily on material inequality or, after we define the terms, on social class and class structure.

Definitions of the concept of **social class** vary considerably, as we will see in the next section, which outlines different theories of social stratification. We prefer to use the term in a general sense to indicate the position of an individual or a family within an economic hierarchy, along with others who have roughly the same amount of control over or access to economic or material resources. For example, an individual can be said to be a member of a class of large landowners, a class of wage-labourers and salaried workers (that is, the "working class"), or a "professional/managerial class." It is their similar economic situation and opportunities, a result of their shared position within a society's system of economic production, that makes these individuals members of the same class. In turn, we can use the term **class structure** to refer to the overall economic hierarchy comprising all such classes, choosing the word *structure* deliberately to indicate the relative stability of this social ranking.

Do you think of yourself as a member of a specific social class? Probably not. Like most North Americans, you probably have a reasonably good idea of how well off you are compared with others in your community. You probably have some sense of where your education, occupation, and income (or your parents' education, occupation, and income) fit in some general hierarchy of socioeconomic status. "Class," however, is unlikely to be part of your everyday vocabulary. Nor is it typically part of the media's vocabulary. The news stories we discussed earlier, for example, identified a number of different dimensions of stratification, but social class was not among them.

This situation does not make class a useless concept. As already suggested, pronounced patterns of material inequality exist in our society and overlap with most other dimensions of social stratification. The economic hierarchy is obviously not completely closed, but it is relatively stable, and it comprises fairly distinct categories of individuals with similar amounts of control over material resources. Hence, it is useful to try to identify the classes that make up the stratification system (or class structure), to seek to understand their origin, and to examine the effects of membership in them on individuals and families. Rather than discarding the concept of class because few people think in these terms, we should perhaps ask why few people think about social classes despite their prominence. This is one of the topics discussed in the next section.

TIME FOR REVIEW

1. Why is the study of social stratification a cornerstone of sociology?
2. Would it be possible to have a society in which no stratification exists? Why, or why not?
3. What do we mean by "meritocracy," "open and closed societies," and "social mobility?"

EXPLANATIONS OF SOCIAL STRATIFICATION

Now that you have considered some examples of social stratification and learned some new concepts, it is time to examine theories (or explanations) of social stratification. As you will see, it is important to consider the time and place in which a social theory was developed, since theorists construct their social explanations on the basis of what they see around them and expect to see in the future.

KARL MARX: CAPITALISM, EXPLOITATION, AND CLASS CONFLICT

Karl Marx had an immense impact on how we think about social stratification (Marx, 1904 [1859]; Marx and Engels, 1972 [1848]). He was born in Germany in 1818 but lived in England from 1849 until he died in 1883. His writings about the social and economic forces that brought about economic change look back over history but focus particularly on the rapidly changing European world that he observed during his lifetime. This was a time when industrial capitalism was transforming the economy and society. Large, mechanized, factory-based systems of production

were emerging; cities were growing rapidly as peasants were being forced off the land and attracted to the city by jobs in factories; and material inequality was extreme, as factory owners and merchants made huge profits while labourers lived in poverty. Trade unions and labour laws that protected workers did not yet exist. For these reasons, as Marx observed, the Industrial Revolution was a time when both the level of economic production and the degree of inequality in society increased tremendously.

Modes of Production and Social Classes

Marx called the system of economic activity in a society its **mode of production**. Its major components were the **means of production** (technology, capital investments, and raw materials) and the **social relations of production** (the relationships between the main classes involved in production). Slavery was the primary mode of production in some societies in ancient times, and feudalism, an economic system in which peasants worked for landowners, not for a wage but for some share of the produce, was the mode of production that gave way to industrial capitalism in Europe.

Within industrial capitalism, Marx identified two major classes: the capitalist class, or **bourgeoisie**, which owned the means of production; and the **proletariat**, or working class, which exchanged its labour for wages. He also described a middle class—the **petite bourgeoisie**—comprising independent owners/producers (farmers, for example) and small-business owners. Marx expected this middle class largely to disappear as capitalism matured and drew some of its members up into the bourgeoisie but pushed most down into the proletariat. Of much greater importance in his theory of class inequality and social change was the relationship between workers and owners.

Marx reasoned that the value of a sold product was directly proportional to the average amount of labour needed to produce it. So, for example, an elegant piece of furniture was more valuable than its component pieces mainly because of the labour invested in it by the worker(s) who built it. Marx argued that the value of goods produced by wage-labourers far exceeded the amount needed to pay their wages and the cost of raw materials, technology, and other factors of production. Marx referred to this excess as **surplus value**. According to Marx, when commodities were sold, their surplus value was turned into profits for the owner.

Marx viewed this as an exploitive relationship but one that differed from the exploitive relationships that characterized slavery or feudalism. After all, factory workers were paid a wage for their labour and were not legally forced to stay with the job. However, because most workers had few other options for making a living, and because owners controlled all aspects of work, the legal freedom of wage-labourers to change jobs was, in practical terms, an illusion.

Class Conflict and Class Consciousness

According to Marx, **class conflict** among major classes is the driving force behind social change. He argued that previous modes of production had collapsed and been replaced because of class conflict. Feudalism in Europe had given way to capitalism as a result of the growing power of the merchant class relative to the traditional alliance of landowners and the aristocracy, and the deteriorating relationship between landowners and peasants. Furthermore, Marx argued, capitalism would eventually be replaced by a socialist mode of production, in which private ownership of property would disappear, along with the exploitation and inequality it produced. The impetus for this massive change would again be widespread class conflict, this time between wage-labourers and the owners of the means of production, as inequality between these two classes became more pronounced.

Marx stated that this revolution would take place only when members of the working class recognized that they were exploited. Marx did not take it for granted that members of a class would see that their interests were similar. Whereas capitalists might be conscious of their class interests, wage-labourers needed to become personally aware of their common enemy. They needed to be transformed from a "class in itself" to a "class for itself." **Class consciousness** was therefore an important social-psychological component of Marx's theory of social inequality and social change. His vision of the future was that of a revolutionary upheaval in which the oppressed working class would recognize its enemy, destroy the institutions of capitalism, and replace them with a classless society based on collective ownership of the means of production.

Responses to Marx

During much of the twentieth century, critics of Marx's ideas pointed to the communist countries, with their apparently socialist system of government and absence

of private property, and noted that inequality had not disappeared there. Instead, a new hierarchy had emerged, in which control of the political and bureaucratic apparatus was the main basis of power. These observations were largely correct. As a Russian quip from the 1970s noted, under capitalism man exploits man, but under communism it is the other way around.

We expect that Marx himself would have been highly critical of the Soviet communist system, given the degree to which individual citizens were exploited and harshly treated by a powerful minority. However, it is slowly becoming apparent that the emergence of a capitalist economy in Eastern Europe over the past two decades is leading to increased material inequality, albeit from a different source (Remington, 2011). Today, individuals with control over some form of production or access to some marketing system are accumulating wealth while the majority of citizens appear to be no better off than before—indeed, many are worse off. The same pattern of growing social inequality has been observed in China, where, despite the continued control of the economy by the Communist Party, some forms of free enterprise have been encouraged (Whyte, 2010). While Marx's predictions about the inevitable emergence of a classless society have not been borne out, his type of class analysis still has considerable relevance for understanding the changing stratification system in North America, Eastern Europe, and even communist China.

Most theories of social stratification developed after Marx's were essentially a "debate with Marx's ghost" (Zeitlin with Brym, 1991: 117). Some sociologists elaborated on Marx's ideas, while others attempted to refute them. Among the critics, some focused on the absence of widespread class conflict, the growth of the middle class, and the relative decline in material inequality in Western Europe and North America in the twentieth century. We will examine some of these theories below, along with others that tried to develop more complex models of the contemporary class structure while basically following Marx's class-based analysis.

MAX WEBER: CLASS AND OTHER DIMENSIONS OF INEQUALITY

Max Weber was born in Germany half a century after Marx, in 1864. Like Marx, he built his analysis of social stratification on a careful reading of history and a thorough analysis of the economic and political events of his day. But because he was only beginning his university studies about the time Marx died, Weber had the advantage of seeing the direction in which a more mature industrial capitalism was taking European society. He continued to write about many aspects of social stratification and social change until his death in 1920.

Class, Status, and Party

Weber shared with Marx the belief that economic inequalities were central to the social stratification system and that ownership of property was a primary determinant of power, or the ability to get others to do what you want them to do. However, he argued that power could lie in controlling resources other than property (Weber, 1948 [1922]). Specifically, he proposed that structures of social stratification could be better understood by looking at economic inequalities, hierarchies of prestige (or social honour), and political inequalities (control of power blocs, such as political parties and other organizations)—in his words, at "class, status, and party." Although these different hierarchies often overlap, they need not. For example, suddenly wealthy individuals might not enjoy the prestige they desire, being rejected in "high society" by those with "old money." Similarly, a politician might have considerable power through control of government resources, but might not be very wealthy or, for that matter, enjoy much prestige.

Since Weber lived to see the emergence of white-collar workers, the growth of large private- and public-sector bureaucracies, and the growing power of trade unions, he was able to write about these alternative sources of power in a stratified capitalist society. He provided an insightful analysis of how power resided in the control of top positions in large bureaucratic organizations, even if the officeholder was not an owner of the organization. He recognized that well-educated wage-labourers might not be as powerless as were the factory workers of an earlier era. He also saw that a new class of middle-level, educated workers might not necessarily align themselves with blue-collar workers, and he was less inclined to conclude, as had Marx, that the middle class would disappear (Zeitlin with Brym, 1991: 118–19). In fact, he expected that the number of educated technical and professional workers in bureaucratic capitalist society would increase.

Compared to Marx, Weber saw considerably more complexity in the social stratification system because of the growing diversity of the occupational

structure and of capitalist enterprises. And although Weber was sometimes pessimistic in his writings about the future of democracy in a bureaucratic capitalist society, he did not link inequality and class conflict to the ultimate demise of capitalism, as did Marx. Similarly, although Weber, like Marx, commented on how members of a class might or might not recognize their shared interests, he did not conclude that it was the inevitable destiny of the working class to become a "class for itself."

Social Class and Life-Chances

Despite these divergences in their thinking, Weber, like Marx, placed primary emphasis on the economic underpinnings of social stratification. However, he defined class more broadly than Marx did. Rather than insisting that a limited number of class positions were based on an individual's relationship to the means of production, Weber saw a larger variety of class positions based both on ownership of property and on other factors, such as occupation and education. Furthermore, he emphasized the **life-chances** that class positions offer, noting that a higher position in the economic hierarchy, however obtained, provides more power and allows an individual and his or her family to enjoy more of the good things in life.

So the general approach to studying stratification that we outlined earlier, one that recognizes the central importance of class while acknowledging that gender, race, and other possibly intersecting dimensions of social inequality can also be very important, is in the Weberian tradition. Similarly, our general definition of class as a relatively stable position within an economic hierarchy held by an individual or a family, along with others with roughly the same amount of control over or access to material resources, follows Weber's use of the term.

DAVIS AND MOORE: A FUNCTIONAL THEORY OF STRATIFICATION

Twentieth-Century Affluence and Functionalist Theory

In 1945, Kingsley Davis and Wilbert Moore published their brief but much-debated article, "Some Principles of Stratification." In Chapter 1, Introducing Sociology, you read about functionalist theory, which emphasizes consensus over conflict and seeks to explain the function for society of social institutions and various aspects of social structure. Davis and Moore were part of this intellectual tradition, which arose in reaction to the conflict-oriented and socially radical theories of Marx (and, to a lesser extent, of Weber).

The emergence of functionalism reflected the optimism of mid-twentieth-century North America. Because World War II was over and the economy was expanding rapidly, affluence was increasing, social conflict was decreasing, and it was widely believed that a harmonious future was dawning. As a result, for several decades after World War II—an era that some describe as the golden era of North American capitalism (Marglin and Schor, 1990)—many social scientists were attracted to theories that downplayed conflict and emphasized the benefits to all of what seemed like an ever-expanding economy.

The Functional Necessity of Stratification

Davis and Moore (1945) argued that, because inequality exists in all societies, it must be a necessary part of society. All societies, they noted, have a variety of occupational roles that need to be filled, some requiring more training than others do, some being more functionally important, and some being less pleasant and more difficult to perform. To get people to fill important roles, perform critical tasks well, and spend time training for high-skill occupations, societies must ensure that the rewards for performing these roles are relatively high. So, for example, doctors and schoolteachers need to be paid more than factory workers and secretaries, and they also rank higher than the latter in terms of social honour and prestige.

In short, according to Davis and Moore, social inequality is both inevitable and functionally necessary for society. Davis and Moore were not describing a class-based and conflict-prone stratification system. Rather, they saw a much more fluid socioeconomic hierarchy, with many different occupational statuses into which individuals are slotted based on their effort and ability. This system is supposedly held together by consensus and shared values (not torn apart by conflict, as Marx theorized) because members of society generally agree that the hierarchy is fair and just. It follows that efforts to reduce social inequality will be ineffective and might even be harmful to society.

Criticisms of Davis and Moore

Many criticisms have been levelled against Davis and Moore's theory. For example, although some differences in pay might be justified to reimburse those

who spend more years in school preparing for a specific occupation, are the huge income and wealth inequalities we see in our society really necessary? Are movie stars, professional athletes, and chief executive officers with multimillion-dollar annual incomes really so much more important to society than are nurses, daycare workers, prison guards, and most other low-paid workers? And how does a theory like this account for inherited wealth and for the fact that wealth leads to power and the ability to accumulate still more wealth?

Given these criticisms, what accounts for the appeal of this theory? Perhaps it is the kernel of truth at its core that is so attractive—namely, the recognition that, to some extent, differences in income and prestige are based on different amounts of effort and ability. After all, we can easily find examples of better-paying occupations that require long years of education and training. Nevertheless, this is far from the complete story about inequality in our society, which is much more pronounced than what such differences in effort and ability might lead us to expect. In fact, the theory's appeal probably lies more in its apparent justification of these large inequalities. You might test this hypothesis by explaining the theory, first to someone with a high income or inherited wealth, and then to someone who is unemployed or earning very little. Chances are that the functionalist explanation of stratification would sound much more plausible to the wealthier person.

GERHARD LENSKI: TECHNOLOGY AND STRATIFICATION SYSTEMS

In the 1960s, Gerhard Lenski (1966) developed a theory of "power and privilege" to explain the extent of material inequality in contemporary and past societies. Lenski's explanation recognized power and conflict more explicitly than Davis and Moore's functionalist explanation did. Like Weber, he identified different dimensions of social stratification, such as education and ethnicity, while emphasizing the centrality of economic inequalities. Although he used the term *class*, Lenski did not define it precisely, choosing instead to talk about the ruling elites in society in general terms and about how they managed to maintain their wealth and power.

Lenski reasoned that a society's technological base largely determines the degree of inequality within it. In simple hunting-and-gathering societies, he argued, resources were distributed primarily based on need. As societies became more technologically complex, resources in excess of those required to fulfill basic needs were produced. Control of surplus resources, or privilege, came to be based on power, allowing ruling elites to keep a larger share of resources. Complex agricultural societies developed highly structured governing and tax-collecting systems, through which privileged ruling elites accumulated immense wealth, while the masses lived in poverty.

However, as a result of industrialization and the complexity of modern technology, this "age-old evolutionary trend toward ever-increasing inequality" (Lenski, 1966: 308) was reversed. Owners of the means of production could no longer control the production process directly and had to rely instead on educated managerial and technical workers to keep the complex system operating. Education broadened the horizons of middle-level employees, introducing them to ideas of democracy, encouraging them to demand a larger share of profits, and making them more articulate in their demands for equality.

Lenski's theory proposed a causal link among complex industrial technology, increased education of workers, and their insistence on sharing the growing wealth of an industrial society. But why would employers give in to such demands? Because, argued Lenski, the industrial elite needed educated workers—they could not produce wealth without them. Equally important, the much greater productivity of industrial societies meant that the elite could "make economic concessions in relative terms without necessarily suffering any loss in absolute terms" (Lenski, 1966: 314). Because the economic pie was so much bigger, everyone could have a larger slice.

In one obvious sense, Lenski's theory resembled the functional theory of stratification—both noted that better-educated and more highly skilled workers are paid more. However, unlike the functionalist approach, Lenski's theory clearly took power differences into account, emphasizing how the extent of accumulation of wealth by elites, or the degree of material inequality, depends on the power and bargaining capacity of middle-level workers. But in contrast to Marx's nineteenth-century prediction of growing inequality as industrial capitalism matured, Lenski, writing in the middle of the twentieth century, believed that inequality was decreasing.

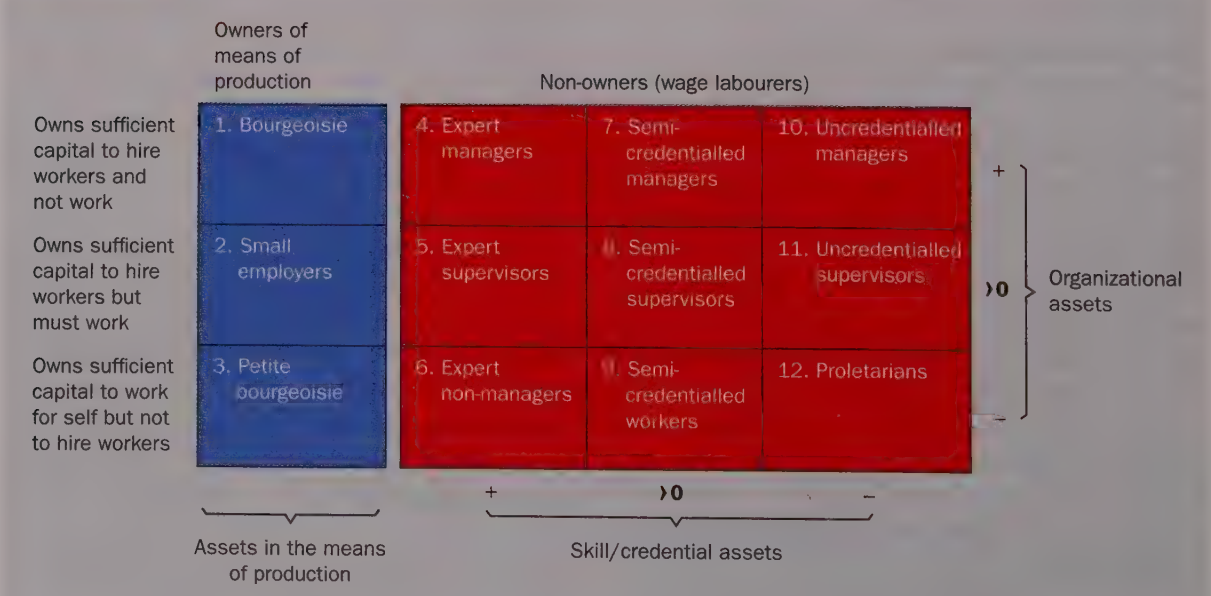
ERIK OLIN WRIGHT: A NEO-MARXIST APPROACH

In reaction against functionalism, Lenski (1966) brought power and conflict back into his explanation of social inequality, coming closer to the approach taken by Marx and Weber. But he did not employ a traditional Marxist analysis of the relationships of different classes to the means of production. In contrast, a number of neo-Marxist scholars, writing in the 1970s and 1980s, attempted to update the original Marxist model to the late twentieth century. One of them was Erik Olin Wright.

Although Marx acknowledged the existence of a middle class comprising several distinct groups, including independent producers and small-business owners, he predicted that the middle class would disappear. Wright's contribution lies in recognizing that, as industrial capitalism matured, the middle class had grown and become more diverse, and in trying to understand the class dynamics of our more complex capitalist system of production. Of particular importance is Wright's notion of **contradictory class locations**—that is, occupational groupings that have divided loyalties within a class structure. For example, although managers work for capitalists, supervising and trying to motivate lower-level employees to produce as much as possible, managers are themselves employees, exploited by owners. Considering the substantial number of people in such contradictory locations, we can begin to understand why the widespread class conflict envisioned by Marx seldom emerged.

Wright (1985) also argued that exploitation of one class by another can occur through control of property or the means of production (as Marx had insisted), as well as through ownership of skill or credential assets and control of high positions within organizations. Accordingly, he identified three classes of owners (the bourgeoisie, small-business employers, and the petite bourgeoisie with no employees), and nine classes of wage-labourers (non-owners), differentiated on two dimensions: the possession of organizational assets and of skill/credential assets (Wright, 1985: 88). For example, "expert managers" (such as engineers or lawyers in senior management positions in large companies) fill a class location characterized by extensive organizational assets and high skill/credential assets, in contrast to "proletarians," who have no specific skill/credential assets and no management or supervisory responsibilities (see Figure 7.1).

FIGURE 7.1 Eric Olin Wright's Typology of Class Location in Capitalist Society



SOURCE: From Erik Olin Wright, *Classes*. (1985, p. 88). Reprinted with permission from Verso Books.

FRANK PARKIN: A NEO-WEBERIAN APPROACH

With his emphasis on organizational and skill/credential assets and contradictory class locations, Wright attempted to bring Marx's class analysis back into the discussion of contemporary forms of social stratification. Frank Parkin (1972, 1979) was equally explicit in stating his intellectual debts to Max Weber's discussions of power, class, and social stratification (Grabb, 2007). As a neo-Weberian, Parkin criticized traditional Marxist and contemporary neo-Marxist analyses for failing to take into account gender, race, religious, and other dimensions of social stratification that do not grow out of the relations of production in capitalist society but clearly have an origin and a permanency all their own (Parkin, 1979: 4–5). Nevertheless, like both Weber and Marx before him, Parkin emphasized the importance of property relations in contemporary stratification systems (Grabb, 2007).

Among Parkin's most useful contributions to stratification theory is his explanation of how structured inequality, whether based on class, gender, race, or some other ascribed or achieved status, is maintained or changed. To do so, Parkin returned to a concept introduced by Weber, that of **social closure**. Parkin defines this term as "the process by which social collectivities seek to maximize rewards by restricting access to resources and opportunities to a limited circle of eligibles" (1979: 44). He then identifies two types of closure strategies that help explain how patterns of social inequality are maintained but also sometimes altered.

Exclusion refers to the organized efforts of privileged, powerful groups to maintain their advantaged position. Processes of exclusion can range from centuries-old caste systems in closed societies to the use, in contemporary open societies, of educational credentials to maintain power and privilege. For example, lawyers and other professional groups have managed to ensure, via legal restrictions, that only they can perform certain types of work in our society. By excluding others from engaging in such work, it is possible to maintain high income, enjoy a high standard of living, and exercise considerable power. Similarly, members of trade unions can use legal sanctions to keep nonmembers, who might have similar skills, from taking on well-paying jobs.

In contrast, **usurpation** refers to the efforts of excluded groups in a stratification system to gain advantages and power. As Parkin put it, all such actions have as their goal "biting into the resources and benefits accruing to dominant groups in society" (Parkin, 1979: 74). Usurpation efforts can range from lobbying and voting for social change to outright revolt against groups in power. Over the past several decades, we have seen successful efforts by women's groups, Indigenous groups, and other disadvantaged groups to change the balance of power and privilege in Canada. Going back further, labour unions took even stronger, sometimes illegal, action to gain new powers and a more equitable distribution of resources for their members.

Parkin, like Lenski, took a keen interest in the power struggles in society between groups with more or less power. However, Parkin's neo-Weberian theory does not contain a premise of inevitability, either one of increased inequality and eventual social revolution as Marx predicted, or one of reduced inequality resulting from technological change and economic growth as Lenski predicted. Parkin, however, did see a clear trend with respect to processes of social closure. With the growing emphasis on education in modern society, the use of educational credentials to maintain power and privilege has become more widespread. As a result, well-educated professionals have become a powerful class grouping, sometimes almost as powerful as wealthy capitalists who control the means of production (Grabb, 2007). Beneath these two powerful groups are a range of other groups with varying amounts of power, trying, when possible, to usurp more power from those above.

PIERRE BOURDIEU: DIFFERENT FORMS OF CAPITAL

French anthropologist and sociologist Pierre Bourdieu also analyzed patterns of social stratification in modern societies through what might be seen as a neo-Weberian lens. Bourdieu developed the concepts of field, habitus, social capital, cultural capital, and symbolic capital, using them extensively in his explanation of how social hierarchies are reproduced across generations (Bourdieu, 1986; Grenfell, 2008).

A field of power, according to Bourdieu, is a social space (work organization, religious institution, or community, for example) where individuals or groups with varying degrees of access to societal resources compete for power, more prominent positions, and more resources (Everett, 2002).

Bourdieu used the term **habitus** to describe people's sense of how to cope or compete and succeed in a particular field of power. Habitus is acquired through extended social relationships in social groups and the learning of shared values and lifestyles. A habitus that can lead to success in a particular field of power is one that involves knowledge of how different forms of capital can be used to get ahead and skill in acquiring such capital.

Economic capital (money, property, and other material assets) is the core form of capital in contemporary society, according to Bourdieu. This view put him in the same general theoretical camp as Marx and Weber. However, economic capital can be converted into other forms of capital, and individuals born into families with more economic capital are likely to acquire a habitus that involves familiarity with and skill in using these different forms of capital.

Social capital comprises social relationships, including networks of relationships, that can help people get ahead in life. An example would be the ability to ask your father to ask another lawyer in his firm to write a reference letter to support your application to law school. **Cultural capital** refers to knowledge and skill in navigating the social world of those who are most advantaged. If you were raised in a wealthy family, for example, you would be more likely to have received music lessons, visited art galleries, and travelled in Europe. You would likely know how to ski and play golf and you would probably be comfortable meeting others and making "small talk" in a social gathering involving wealthy and powerful people.

Symbolic capital is obtained through social recognition. Such recognition might involve being elected president of a community organization, being featured as a trendsetter for clothing or music in a magazine, or receiving an honour for an accomplishment in acting or sports. It is not difficult to imagine how greater access to economic, social, and cultural capital might also increase one's chances of acquiring symbolic capital.

Bourdieu's main point is that a person's habitus is not built just on economic foundations. Economic capital enables the acquisition of social capital that, in turn, increases the likelihood of acquiring cultural and symbolic capital. A complete sociological analysis of how stratification systems are maintained requires understanding how people acquire each type of capital. It is possible although not common for a person to acquire, say, cultural capital without economic capital and so improve his or her position in the stratification system. However, all forms of capital are correlated—economic advantage tends to give rise to social, cultural, and symbolic advantage. Altogether, knowledge about how to use various forms of capital forms the habitus of each one of us and helps to explain how social stratification systems persist.

EXPLANATIONS OF SOCIAL STRATIFICATION: SUMMING UP

The theories we have reviewed differ in the assumptions they make and the conclusions they draw about the future of material inequality. Marx clearly saw inequality and exploitation of the working class increasing, and he predicted that class conflict would lead to the death of capitalism. Weber was not convinced that a socialist society would eventually emerge, nor did he argue that inequalities would gradually decrease (Grabb, 2007). Neo-Weberians like Parkin and Bourdieu took a similar stance. Wright's neo-Marixist analysis of the growing number of middle-class locations also does not suggest an increasing level of material inequality, but neither does it imply the opposite. However, the functionalists and Lenski, writing in an era of economic growth and widespread optimism about the ability of capitalism to raise the overall standard of living, clearly felt that material inequalities were shrinking in Western industrial societies.

The various explanations also differ in the degree to which they emphasize class differences in access to and control of material resources. For Marx, class was the primary determining factor in this regard. Weber, using the term *class* somewhat more broadly, emphasized its central role but recognized other important dimensions of social stratification. So, too, did Parkin, who explicitly discussed the independent effects of gender, race, and religion, and Bourdieu, who encouraged us to examine different forms of capital. Davis and Moore ignored the concept of class. Although Lenski focused more directly on economic inequality, he did not really describe society in terms of distinct classes, as Wright did in his neo-Marxist approach.

In the following section, we turn from theories of social inequality to data on occupations and material inequality in Canada to see if the concept of social class still has relevance in contemporary society.

TIME FOR REVIEW

1. What is the key difference between the functionalist theory of stratification and conflict-oriented explanations?
2. How are theories of social stratification shaped by the historical period during which the theorist lived? Provide examples.
3. How did Weber's analysis of social stratification differ from Marx's?
4. What are the unique insights that Frank Parkin and Pierre Bourdieu brought to our understanding of contemporary patterns of social stratification?

OCCUPATIONS, SOCIAL CLASS, AND INEQUALITY IN CANADA

OCCUPATIONAL SHIFTS OVER TIME

Some of the explanations of social stratification we reviewed above, such as Lenski's, focus directly on occupations while others, such as Wright's, rely on occupational data to discuss social class. Consequently, this section begins by examining occupational shifts in Canada over the past century. Table 7.1 displays the types of occupations most common near the beginning (1911) and the middle (1951) of the last century, and recently (2016). The biggest change is the decline in agricultural occupations, from 34 percent of all labour force participants in 1911 to only 1 percent in 2016. Other natural resource-based occupations (forestry, fishing, mining) also declined, but not as steeply. Manufacturing occupations increased in relative terms (from 14 to 17 percent) between the beginning and middle of the last century, but by 2016 had dropped to only 5 percent of the employed labour force.

Manufacturing, construction, transportation, and resource-based occupations are typically called *blue-collar occupations*, in contrast to *white-collar occupations* in the managerial, professional, clerical, sales, and service categories. Table 7.1 shows that white-collar occupations have come to greatly outnumber blue-collar occupations as industrial capitalism has matured. In 2016, 15 percent of Canadian labour force participants were in managerial/administrative occupations, up from only 5 percent a century earlier.

Professional/technical occupations increased by a factor of seven in relative terms, from 4 to 28 percent. Clerical, sales, and service occupations have also become more common, from a total of only 17 percent in 1911 to 35 percent of all occupations in 2016.

TABLE 7.1 Occupational Distribution of Labour Force Participants,* Canada, Percentage, 1911, 1951, 2016

OCCUPATION TYPE	1911 %	1951 %	2016 %
Managerial/ administrative	5	8	15
Professional/technical	4	7	28
Clerical	4	11	11
Sales	5	7	10
Service	8	10	14
Manufacturing	14	17	5
Transportation	6	8	8
Construction	5	6	6
Agriculture	34	16	1
Forestry/fishing/mining	5	4	2
Other occupations	10	6	—
Total	**100**	**100**	**100**

*1911 and 1951 data describe all labour force participants (the employed and the unemployed); 2016 data are for employed labour force participants only. All three percentage distributions are based on the population aged 15 and older.

SOURCES: 1911 and 1951 data adapted from 1911 and 1951 Statistics Canada census results, presented by O'Neill (1991); 2016 data adapted from the 2016 census, Statistics Canada (2019a), "2016 Census of Population." Catalogue no. 98-400-X2016304.

What do these occupational changes tell us with respect to our previous discussion of the bases of social stratification? First, as various theories stipulate, the proportion of occupations requiring higher education has increased while the proportion of traditional blue-collar, "working-class" occupations has declined. With the expansion in white-collar occupations, average incomes rose, at least until the early 1980s. So, to the extent that occupational data can inform us about class structure in the Weberian sense, occupational shifts over the past century suggest greater class diversity, rather than a polarization of classes, as a strict reading of Marx's theory would predict, and a rising standard of living for Canadian workers, rather than increasing poverty and exploitation.

And what do the numbers in Table 7.1 not tell us? First, they do not distinguish between the

occupations typically held by women and those typically held by men. Since the middle of the last century, more women have been entering the labour force and moving into better jobs. But, as you saw (Chapter 5, Genders and Sexualities), women are still more likely to be employed in clerical, sales, and service occupations (what might be called a "pink-collar sector") than in blue-collar occupations or in higher-status and better-paying managerial and professional occupations. So gender-based labour market stratification continues to exist, intersecting with class-based stratification.

Second, the data in Table 7.1 do not directly describe workers' relationships to the means of production. Unfortunately, Statistics Canada has never collected and categorized national data in a manner that would allow us to examine changes in Canada's class structure, either as Marx would have conceptualized it or as Erik Olin Wright updated it (refer back to Figure 7.1). Even so, we can learn something from data on self-employment. Between 1946 and 1981, a period of significant decline in the number of people employed in agriculture, the proportion of self-employed Canadians dropped dramatically, from 33 percent to 10 percent. However, beginning in the 1980s, a slow reversal of the trend began in Canada, the United States, and other Western industrialized countries. By 2018, 11 percent of employed Canadians were self-employed (without any employees) and 5 percent employed others (Statistics Canada, 2019b).

Researchers are uncertain whether more Canadians are voluntarily choosing self-employment or are being pushed into it as a result of higher levels of unemployment and growing corporate and public-sector downsizing. Nevertheless, the reversal of the decline in self-employment—the increase in the size of the petite bourgeoisie—is something theorists are trying to explain as they attempt to further update Marx's ideas of class-based stratification (Myles and Turegun, 1994).

Finally, the data in Table 7.1 do not reflect some of the dramatic changes in employment opportunities and outcomes that have been occurring in the past four decades. We will return to this topic later, but for now we will simply note that unemployment rates have risen and fallen, but never fallen to the level of the mid-twentieth century; part-time and temporary work have become much more common; and income growth appears to have stopped, while income and wealth inequality have increased. Consequently, the higher standard of living that accompanied occupational changes in the second half of the twentieth century is no longer guaranteed for all those in middle-status occupations. So we need to look carefully at the distributional side of the occupation and class structures, at "who gets what" in return for their employment (Westergaard, 1995). But before examining changing patterns of material inequality in Canada, we will first discuss another important feature of stratification systems in modern societies—opportunities for occupational mobility and status attainment.

OCCUPATIONAL MOBILITY AND STATUS ATTAINMENT

Many people move up the occupational and income ladders during their careers, frequently after investing in higher education of some kind. Some move down, often because of economic circumstances beyond their control. Sociologists have conducted a great deal of research on such **intragenerational occupational mobility** (mobility within an individual's lifetime) and on **intergenerational occupational mobility**, the process of reaching an occupational location higher or lower than the location your parents held. Such research is interesting in itself, since we all like to compare how well we have done relative to others. It is also theoretically important because it tests hypotheses derived from explanations of inequality (the functionalist perspective, for example) that propose that higher positions in society are generally filled by those most qualified.

If the only intergenerational occupational mobility we observed was a result of better-qualified people moving up to replace those who were less qualified, we should also see an equivalent amount of downward mobility. Such a scenario of "musical jobs" or, to use the technical term, **circulatory mobility**, does not really describe the Canadian situation over the past 70 years, however, because of the pronounced parallel process of **structural mobility** resulting from a significant change in the shape of Canada's overall occupational structure. As noted earlier, since the middle of the twentieth century, industrial societies, including Canada, experienced a great deal of growth in white-collar occupations (clerical, managerial, and professional positions) as traditional agricultural and blue-collar industrial jobs declined in relative importance. Hence, with an increase in the number of higher-status jobs, each generation had

more chances than the preceding one to improve the status of their jobs.

Even so, Canadian studies conducted over the past several decades indicate that Canada, like the United States, has a relatively open stratification system, more so than countries like Sweden, the United Kingdom, France, and the Netherlands (Wanner, 2009). In other words, in Canada relatively more people have been able to move up the occupational ladder relative to their parents. During the second half of the last century, the Canadian occupational structure opened up for women and men in different ways. The steep decline in agricultural employment meant that many men moved out of the agricultural occupations held by their fathers. For women, the major shift was away from the housework that had been the main female occupation for their mothers' generation. For both sexes, expansion of postsecondary educational opportunities, leading to higher status occupations, played an important role (Wanner, 2009). However, most of the opening of the stratification system occurred between 1973 and 1986. Little changed in terms of mobility opportunities in the following decades.

Overall, Canadian mobility studies find a limited amount of direct occupational inheritance across generations. Yet those at or near the top of the occupational hierarchy are still more likely to pass their advantages on to their children. As Richard Wanner (2009: 129) concludes, "Canada is still a stratified society characterized by a considerable amount of inheritance of privilege." The intergenerational transfer of advantage takes place primarily through different levels of access to the postsecondary education system.

Research in Canada and other Western countries examining the process of occupational status attainment has shown, not surprisingly, that the most important influence on the status of an individual's current job is the status of that person's first job. Individuals who enter the labour market as articling lawyers, for example, typically make their way higher up the occupational ladder than do those who begin as unskilled labourers. In turn, the status of that first job is heavily influenced by the level of education completed. Such findings obviously lend some support to theories suggesting that more-qualified people, as indicated by higher education, end up in higher-status and better-paying occupations.

However, many studies have also traced education–job linkages back to the previous generation, showing that those who obtain more education and hence better jobs are more likely to come from families with better-educated parents. For example, a 2009 study divided Canadians between the ages of 25 and 39 into two categories—those whose parents had no university degree and those whose parents had at least one university degree. Fifty-six percent of 25- to 39-year-olds in the latter category but just 23 percent of 25- to 39-year-olds in the former category had completed university themselves (Turcotte, 2011). For a variety of reasons, including, in Pierre Bourdieu's language, access to more economic, social, and cultural capital, children from more advantaged backgrounds can build on their initial advantages.

THE DISTRIBUTION OF WEALTH

Evidence from various sources demonstrates that a small number of people continue to own or control a very large portion of the wealth in Canada. For example, in 2019, 61-year-old David Thomson and his family were estimated to be worth $36.8 billion. While only number 27 on the *Forbes* list of the world's billionaires that year, they were Canada's wealthiest family. In contrast, in 2016, the average wealth, or net worth (the difference between the total assets owned by a family, including a home, and its debt), for Canadian households was $669 300 (Statistics Canada, 2019c), less than 0.002 percent of the Thomson family's net worth. This is a huge difference, but we should remember that, included in the Canadian average are the extremely rich, including the Thomson family. People in the bottom fifth of the wealth distribution reported an average net worth of –$1000 (Statistics Canada, 2019c).

These statistics highlight the wealth gap between low-income and very rich Canadian families, such as the Thomsons, the Westons, and the Irvings, who have business holdings spread around the globe as well as in Canada. Together with highly paid CEOs and corporate directors, these wealthy families clearly form a distinct upper class, the haute (high) bourgeoisie in Marx's terms. By way of example, it would take the average Canadian worker (employed full-time and year-round) nearly 200 years to earn as much as the average annual income of the top 100 CEOs in the country.

At the other end of the wealth scale are the 7 percent of Canadian families (excluding seniors) with low income and no-wage earners who reported a median net worth in 2009 of only $1000. These

families, about 1.2 million people in total, typically relied on government transfer payments (for example, employment, welfare, or disability support payments) and had trouble making ends meet. Three out of 10 (29 percent) were at least two months behind in paying bills, and almost one in 10 (8 percent) was at least two months behind on loan payments (Luong, 2011).

Over the long term, the economic growth experienced in Western industrialized countries, along with some income redistribution efforts by governments, have had an equalizing effect on the distribution of household wealth. Wolff (1991), for example, showed that inequality in household wealth decreased between 1920 and the 1970s in Sweden, Britain, and the United States. Although comparable data are not available for Canada for the same period, it is likely that a similar decline occurred here as well. However, Wolff also noted that, in the mid-1970s, wealth inequality began to increase again in the United States and Sweden. It remained constant in Britain. What about Canada?

On average, Canadian families have increased their wealth since the 1970s (Macdonald, 2018; Morissette and Zhang, 2007). However, there is more to this story. Wealth inequality declined between 1970 and 1977, remained steady until 1984, and then increased considerably in the next 20 years. So, back in 1984, the top 10 percent of Canadian families owned 51.8 percent of total family wealth. By 2016, this figure had increased to 67.3 percent (Statistics Canada, 2019c). In other words, the wealth gap between rich and poor families has been growing over the past several decades in Canada. In fact, as of 2016, Canada's wealthiest 87 families owned more than everyone living in Newfoundland and Labrador, Prince Edward Island, and New Brunswick combined (Macdonald, 2018).

SOURCE: © Malcolm Mayes/Artizans.com.

INCOME DISTRIBUTION

High-Paying and Low-Paying Occupations

Most people have no contact with the wealthiest families in Canada. We are much more aware of, or perhaps are even members of, a larger, not quite as wealthy but still affluent group of households containing one or more individuals in high-paying occupations. For example, according to 2016 census data, Canadian dentists earned a median income of $98 582 in 2015, while medical specialists earned considerably more ($122 002). Judges earned even more ($259 603), while lawyers had to be content with average yearly earnings of $97 589 (Statistics Canada, 2019d). In contrast, cashiers earned only a fraction of this ($10 054), as did taxi drivers ($13 432), hair stylists and barbers ($16 393), and home child-care providers ($12 688). The low incomes of these service-sector workers reflect, in part, the fact that many are employed part-time.

Using the term *class* in the Weberian sense, you could label individuals in well-paid managerial and professional occupations as members of an upper-middle class, given their high incomes and their access to and control of material resources through their employment positions. In contrast, retail workers and those employed in some service occupations (for example, food and beverage services, child-care and home-support services) work in the low-paying, insecure occupations that we might describe as the lower working class.

These occupational earning patterns hide large gender differences. Among people working full-time and full-year, women's earnings were 80 percent of men's earnings in 2015, a figure that has not changed significantly since 1995 (Krahn, Hughes, and Lowe, 2020: Ch. 6; Statistics Canada, 2019c). Female dentists' median earnings were 87 percent of their male counterparts' median earnings in 2015. Among senior managers in finance and communications, women earned 88 percent of what men earned. In the higher education sector, the female–male median earnings ratio was 92 percent. Among lower-paid occupations, female salesclerks earned only 71 percent of what male salesclerks earned, while female general farm workers earned 66 percent of their male counterparts' earnings (Statistics Canada, 2019b). As these examples

demonstrate, the female–male earnings ratio varies considerably by occupation, and tends to be lower in higher status and better paying occupations. However, women also tend to be underrepresented in higher status occupations, which contributes to the broader gender pay gap.

Income Inequality

The 2016 census data discussed above give some indication of the distribution in Canada of employment earnings, the largest component of total income, which also includes income from investments, government assistance, and all other sources. Studies of income tax data show that the level of total income inequality in Canada has increased dramatically over the past few decades.

In 1945, at the end of World War II, the most advantaged 10 percent of Canadians (the top decile) received 37 percent of all income (Yalnizyan, 2010). While this figure fluctuated over the next four decades, income inequality in Canada slowly declined. In 1985, the top decile received 35 percent of all income. However, the long-term trend then reversed, and income inequality increased steadily during the next two decades—in 2016, the top 10 percent received 38.5 percent of all income. In fact, by 2016, the top 1 percent of Canadian income earners were receiving 10.7 percent of all income, up from 7.6 percent 35 years earlier (see Figure 7.2). When income from privately owned corporations (frequently set up by high earners to reduce their taxes) is considered, income inequality is even higher (Wolfson, Veall, and Brooks, 2014).

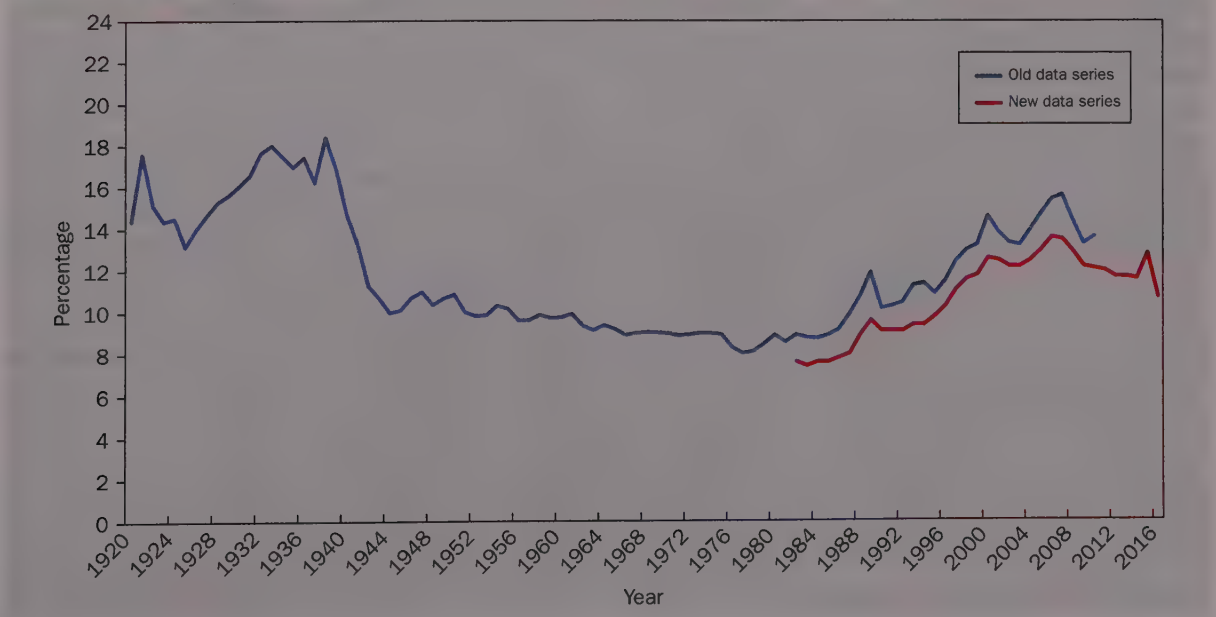
THE POOR

Defining and Measuring Poverty

Poverty can be defined in different ways. We could talk about **absolute poverty**, arguing that the poor are those who have barely enough to stay alive, like many of the inhabitants of poor countries. Or we could conclude, as most Canadians do, that **relative poverty** is really what matters. If your neighbours own their homes and one or more cars, eat in nice restaurants, put money into pension plans, and take foreign vacations, while you rent a small apartment, ride the bus, look forward to a meal at McDonald's, have no savings, and watch travel shows on TV, you probably consider yourself poor. According to this definition, Canada has a considerable number of poor people.

Most discussions of poverty in Canada rely on the **low-income cutoff (LICO)**, commonly, although unofficially, known as the "poverty line." The average Canadian spends about 43 percent of

FIGURE 7.2 Share of Total Income, Richest 1 Percent, Canada, 1920–2016



SOURCES: Old data series: Saez and Veall (2007); Veall (2012); Yalnizyan (2010). New data series: Statistics Canada. Table 11-10-0055-01, "High income tax filers in Canada."

after-tax income on the basic necessities (food, shelter, and clothing). To establish the LICO, Statistics Canada adds 20 percent to this figure (Statistics Canada, 2019e). Hence, anyone spending more than 63 percent of after-tax income on the basic necessities is considered a low-income earner. Obviously, some people budget better than others do, so these are average cost estimates. However, there is no denying that the cost of living is higher in larger urban centres and that it takes more money to feed and clothe additional people, so different LICOs are calculated for communities of various sizes and for families of various sizes within those communities (Statistics Canada, 2019e). For example, based on 2016 income data, Statistics Canada sets the after-tax LICO for a single person living in a city with more than half a million residents at $20 675, compared with $13 525 for a single person living in a rural area. The after-tax low-income line for a family of four in a large city was $39 092, substantially higher than that for a similar-sized family in a rural area ($25 571).

Who Are the Poor?

Rising unemployment causes the number and proportion of people living below the poverty line to increase. In 1980, for example, 11.6 percent of all Canadians were below the after-tax poverty line but, with the recession of the early 1980s, that figure climbed to 13.7 percent by 1984. As the economy recovered, the proportion of poor Canadians dropped again to 10.2 percent in 1989 but then rose steeply to 15.2 percent in 1996 following the recession in the early 1990s. Over the next decade, the proportion of poor Canadians rose and fell again. In 2015, the most recent year for which data are available, 9.2 percent of Canadians were living below the after-tax LICO (Statistics Canada, 2019f).

Although poverty rates tend to follow unemployment rates, not all of Canada's poor are unemployed or out of the labour force. In 2014, 746 000 Canadians were living in working poor households, where the main earner had been paid for at least 910 hours of work (Statistics Canada, 2016). These families were poor, not because no one in them was working for pay but because they earned so little. Overall, as part-time and temporary work have become more common in Canada, the working poor have come to make up a larger proportion of Canada's poor (Krahn, Hughes and Lowe, 2020: Ch. 4).

Stemming from a long history of colonization, Indigenous people are among the poorest citizens of our country. In 2015, the unemployment rate among Indigenous Canadians (15.2 percent) was more than twice as high as among non-Indigenous people (7.7 percent) (Statistics Canada, 2019g). First Nations living on reserves have the highest unemployment rate (24.9 percent in 2015). The poverty rate (LICO) for First Nations living off-reserve in 2015 was 18.3 percent, compared with 9.2 percent for all Canadians (Statistics Canada, 2019h). The comparable rate for First Nations living on reserves, if available, would be much higher.

On average, recent immigrants are younger and more educated than are native-born Canadians (see Chapter 8, Race and Ethnic Relations). Even so, in 2015, 21 percent of immigrants who had arrived in Canada in the previous decade were living below the LICO, and this figure does not include non-permanent residents, who were more than twice as likely to live in poverty (Statistics Canada, 2019i). So, despite their relatively high level of education over the past several decades, recent immigrants have come to be significantly overrepresented among Canada's working poor (Picot and Lu, 2017).

Several decades ago, senior citizens were more likely than younger Canadians were to be living below the poverty line. However, a higher proportion of recent cohorts of retirees have had employer-provided pensions and personal retirement funds (Gougeon, 2009), and the federal government has maintained old-age pension levels. Consequently, in contrast to the working poor, among whom poverty rates have risen, the poverty rate for seniors has declined. In 2015, only 5.1 percent of seniors were living below the LICO, compared with 9.2 percent of the total Canadian population (Statistics Canada, 2019f). In contrast, 19.2 percent of Canadian single parents were living below the LICO in 2015. Eighty-five percent of these single parents were women. Many of these young women were completely dependent on social assistance, since it is almost impossible for a single young mother to look after children and hold down a job.

Social Assistance for the Poor

Many people believe that "welfare" (social assistance) and Employment Insurance are too easy to obtain and that the amount of money received is enough to discourage people from seeking work (Swanson, 2001). Is this true? Because welfare regulations vary

across provinces and territories, we will examine data from Ontario, the largest province and among the provinces with the highest welfare incomes, for 1997, 2007, and 2017.

Figure 7.3 shows that, in 1997, a single, employable adult (an adult who did not have a disability, was not a senior, and was not considered unable to seek work because of family responsibilities) who was eligible for Ontario social assistance received 42 percent of the after-tax low-income cut-off (LICO). A decade later, in 2007, the same type of person received only 33 percent of LICO, but the rate later rebounded so that person received 45 percent of LICO in 2017. Single people with disabilities who are receiving welfare have generally been treated a bit more generously–in 1997, such an individual would have received total annual transfer payments that were 72 percent of the LICO. In 2017, the $14 682 that a person with a disability received from the provincial government was 70 percent of the LICO.

Single parents and couples with children, like adults with disabilities, have also been treated somewhat better by the welfare system, compared to single, employable adults, and for both groups we see in Figure 7.3 that their total annual welfare payments, as a percentage of the appropriate low-income line for their family type, increased over the past two decades. In fact, in 2017, a single parent with one child would have received $21 136, or 83 percent of the LICO. However, the $20 545 that a couple with two children would have received from welfare that year was only 77 percent of the LICO (Tweddle and Aldridge, 2018).

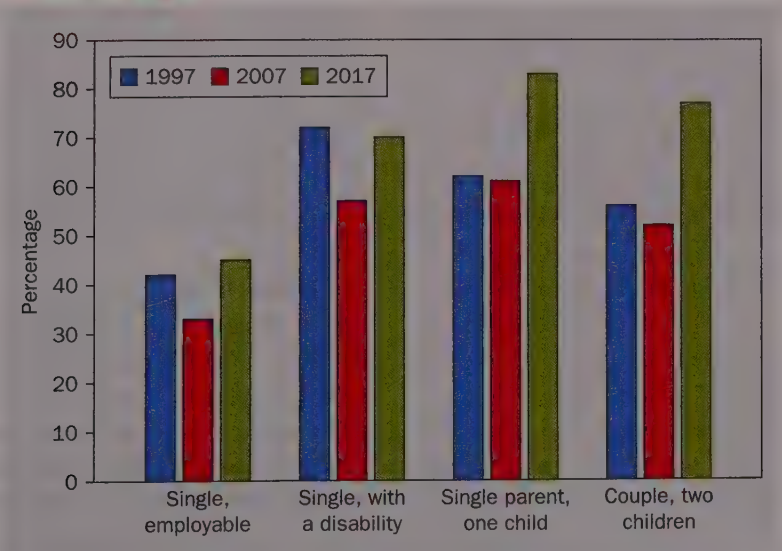
Summing up, in Ontario, and also across Canada, the amount of welfare assistance is low. Increases to welfare income for almost all types of recipients in recent years have helped to offset cuts made in the early-to-mid 2000s. However, welfare income does not bring recipients up to the poverty line. Consequently, it is difficult to accept the argument that overly generous welfare systems discourage people from looking for work. Many of those who receive assistance cannot work outside the home, and the money provided keeps the poor who receive it well below the poverty line.

Moving Into and Out of Poverty

Discussions of poverty can leave the impression that the poor and the nonpoor are separate groups and that there is little mobility from one status to the other. While the proportion of Canadians with low income, defined as income that is half the median income for a family the same size, has varied between 10 and 14 percent over the past several decades, between 2009 and 2016, 27 percent of all Canadians lived below the low-income threshold for at least one year (Statistics Canada, 2019j, 2019k).

Additional data reveal that, between 2015 and 2016, about 4 percent of all Canadians slid below

FIGURE 7.3 Total Welfare Income as a Percentage of After-Tax LICO, Ontario, 1997, 2007, and 2017



SOURCES: 1997 data from the National Council of Welfare, *Welfare Incomes 1997 and 1998* (Ottawa: 2000), Table 3; 2007 data from the National Council of Welfare, *Welfare Incomes 2006 and 2007* (Ottawa: 2008), Table 2.1-b; 2017 data from Anne Tweddle and Hannah Aldridge. (2018). *Welfare in Canada 2017*, p. 63. Toronto: Maytree.

the low-income threshold, while a similar proportion moved above it (Statistics Canada, 2019l). Obviously, poverty is not a static status. Individuals and families move into and out of poverty each year. Nevertheless, a sizable minority remain stuck in poverty year after year. Losing a job, having to take a lower-paying job, becoming a single parent, or being widowed can drastically increase the chance of falling into, and remaining stuck in, poverty. In addition, welfare regulations in many provinces "claw back" social assistance benefits as soon as welfare recipients start earning even a small income (Tweddle and Aldridge, 2018). This predicament creates a "welfare trap" that further increases the chance of poor Canadians, particularly single-parent families, remaining poor.

MATERIAL INEQUALITY IN CANADA: SUMMING UP

Is Inequality Increasing in Canada?

Compared with some other countries, and compared with the situation in Canada a century ago, the level of inequality in this country today is relatively low. Even so, you have seen evidence of a great deal of inequality in wealth and income. Furthermore, indications are that, for several decades, the level of inequality has been slowly rising. Corporate concentration has been increasing as a small number of huge business enterprises, many of them family-owned or family-run, have gained control over a larger share of the assets of Canada's biggest corporations. Wealth inequality in general appears to be increasing, income inequality has risen, and the number of working poor has increased.

Looking more closely at the labour market, we see that unemployment rates have been rising slowly but steadily for several decades. Although these rates have gone up and down a number of times, and are lower now than they were in the 1990s, the long-term trend since the mid-twentieth century has been upward. In 2018, the average annual unemployment rate was 5.8 percent, representing 1.76 million unemployed Canadians (Statistics Canada, 2019m), a number almost equal to the populations of Manitoba and Prince Edward Island combined. With increasing global financial and economic uncertainty, we can expect the national unemployment rate to stay at least at this level over the next several years. Comparisons across provinces in 2018 reveal the extent of regional inequality in Canada, with unemployment rates of 13.8 percent in Newfoundland and Labrador, 8.0 percent in New Brunswick, 5.6 percent in Ontario, and only 4.7 percent in British Columbia.

The part-time employment rate has also been rising over the past few decades. Back in 1953, fewer than 4 percent of employed Canadians worked part-time. In 2018, 18.7 percent had a part-time job. Employers do not have to pay pension and other benefits to part-time employees, so they have been hiring more part-time employees since the 1980s, thus cutting costs. By 2018, 13.3 percent of working Canadians had a job with a specific end date (Statistics Canada, 2019n). Real wages are increasing slowly, and inequality in earnings has been rising as a result of part-time and temporary employment trends, as well as declines in employment in traditionally higher-paying industries and occupations (see Critical Sociology: How Precarious Work Contributes to Economic Insecurity in Canada).

A More Polarized Society?

It is difficult to avoid the conclusion that, in Canada, the gap between the advantaged (those with full-time, permanent jobs) and the disadvantaged (those with part-time, temporary, or no jobs) is slowly increasing (Heisz, 2016). A similar pattern has been observed in the United Kingdom and the United States (Alvaredo et al., 2018). In fact, as French economist Thomas Piketty (2014) has argued, under capitalism, growing inequality is inevitable, even with a growing economy.

This is not to suggest that a new era of massive inequality is dawning. However, the evidence is clear that inequality is increasing, and that society is becoming more polarized in terms of access to and control over economic resources (Fortin et al., 2012; Foster and Wolfson, 2010). Using Weber's definition of class, we can conclude that class differences in Canada and many other countries are becoming more pronounced.

Obviously, many interrelated factors have contributed to the growth in inequality. In North America, layoffs and downsizing have been a frequent response to economic downturns. So has the replacement of full-time permanent jobs with part-time and temporary positions. Globalization has led to a more competitive, cost-cutting economic environment. Business enterprises have responded by shifting many of their activities to countries in which lower wages and less rigorous environmental and labour laws allow them to earn higher profits.

Critical Sociology

HOW PRECARIOUS WORK CONTRIBUTES TO ECONOMIC INSECURITY IN CANADA

Uber, Lyft, AirBnB, SkiptheDishes, TaskRabbit—these are the companies that come to mind when we talk about "the gig economy," "the new economy," or "precarious work." However, these terms refer to something much broader than a few well-known companies (Katz and Krueger, 2018).

Precarious work, or "employment that is uncertain, unpredictable, and risky from the point of view of the worker" (Kalleberg, 2009: 2), is characteristic of the new economy dominated by service-sector jobs. It includes temporary employment, such as seasonal labour, term or contract jobs, and casual work. Such jobs accounted for 13.3 percent of total employment in Canada in 2018 (Statistics Canada, 2019n). According to a 2018 study by the Canadian Centre for Policy Alternatives, 22 percent of professionals were in precarious jobs, many of whom reported fluctuating incomes and unpredictable schedules (Hennessy and Tranjan, 2018). There's a good chance that the person teaching your sociology class is an adjunct professor or sessional instructor who is paid per course, earns only a fraction of what a full-time professor earns for teaching, and receives few employment benefits (Pasma and Shaker, 2018). Although contract academic staff have been part of universities since their inception, these positions have been growing relative to the number of tenure-track positions as more universities come to rely on temporary staff to deal with budget cuts (Ehrenberg, 2012; Field et al., 2014; Thedwall, 2008).

Precarious employment has numerous negative consequences (Anani, 2018; Standing, 2016). Temporary jobs can act as stepping stones to permanent employment. However, that is not always the case (Fuller, 2011). More often, temporary workers move into unemployment or another temporary position after their temporary job ends. And a history of temporary employment can lead to lower earnings for many years to come, even among workers who find full-time employment (Fuller and Stecy-Hildebrandt, 2014).

Nor does precarious employment affect all workers equally. Women account for a larger proportion of precarious professionals than do men, and they are more likely to have temporary jobs (Fuller, 2011; Hennessy and Tranjan, 2018). Overall, the rise in precarious work has contributed to growing economic insecurity among workers and families, as a job no longer guarantees consistent income or a pension for most workers (Hacker, 2006; Vosko, 2006).

Four main drivers explain the rise of precarious labour—de-unionization, financialization, globalization, and the digital revolution (Kalleberg and Vallas, 2017). First, the waning power of unions means that workers enjoy less protection in the labour market. For example, the proportion of workers with company pensions is low and falling. Financialization refers to shareholders' intensifying desire to see share prices increase. One way to achieve that outcome is for companies to hire fewer people with stable, full-time jobs and more people with precarious jobs.

At the same time, globalization makes it easier for companies to locate factories and offices in places where wages and salaries are low. In high-wage regions, the wage bill must fall to stem the outflow of investment and therefore jobs. Again, precarious employment helps in this regard. Finally, the digital revolution decreases the need for human labour. Together, these forces have resulted in risk being shifted toward workers as jobs become more precarious.

Critical Thinking Questions

1. What are the main features of precarious work? List examples of precarious jobs.
2. What are some of the pros and cons of work in the new economy?

Labour unions, which traditionally have resisted attempts to cut wages and jobs, have lost some of their power. At the political level, an ideology emphasizing that "the market knows best," and that people need less rather than more government intervention in the economy and the labour market, has led to fewer government efforts to reduce inequality and reduced transfer payments to the poor (Fortin et al., 2012). Tax cuts for the highest income groups have exacerbated patterns of income and wealth inequality (Myles and Banting, 2013).

CONSEQUENCES OF MATERIAL INEQUALITY

Other chapters in this textbook will go into more detail about the many consequences of inequality for individuals and families. You will see that position in the class structure affects behaviour, and that the poor, the middle classes, and the very wealthy frequently hold different opinions on various subjects, may vote differently, and certainly enjoy different lifestyles. In short, people in different positions in society's

economic hierarchy experience different life-chances, to use Weber's term.

Consequences for Individuals and Families

Children from poorer families typically do not do as well in school as children from more affluent families do (Davies and Guppy, 2006). They are more likely to drop out before completing high school and to be enrolled in nonuniversity academic streams if they stay in school (Tanner, Krahn, and Hartnagel, 1995; Taylor and Krahn, 2009). They are also much less likely to go to university and to experience more difficulties if they do go (Lehmann, 2012). As noted earlier in the discussion of occupational mobility, such effects of poverty are largely responsible for the perpetuation of class inequalities from one generation to the next.

For a variety of reasons, including better nutrition, access to better health care, and less hazardous working conditions, those who are situated higher in the economic hierarchy are typically healthier than are poor people (Raphael, 2011). Consequently, on average, the poor do not live as long as those who are better off (Wilkinson and Pickett, 2010). Similarly, when dealing with the criminal justice system, those with greater access to and control over economic resources tend to fare better (King and Winterdyk, 2010). As a result, the poor are overrepresented in jails. Indigenous and visible minority Canadians with low incomes are particularly disadvantaged when dealing with the criminal justice system (Fitzgerald and Carrington, 2008). These examples show that life-chances are a function of position in the class structure and that those higher up in the economic hierarchy enjoy a better quality of life and, often, a longer life.

Consequences for Society

In addition to these substantial consequences for individuals and families, can material inequality have other broader social outcomes? Specifically, given the relatively high and increasing level of inequality in Canada, can we expect more social unrest? Will conflict between the "haves" and the "have-nots" increase? Those committed to a classical Marxist theory of social change might welcome such conflict; for them, it would indicate that capitalism was finally beginning to give way to a socialist society. Others might view such conflict negatively. Whatever the response to such a possibility, it is clear that values and beliefs directly influence the way people respond to evidence of inequality and its consequences.

But returning to the question, can we expect an increase in social unrest and conflict as a result of higher levels of inequality? During the early 1980s, the solidarity movement in British Columbia brought together members of trade unions, social-welfare organizations, and various community-based groups in opposition to the Social Credit government's cutbacks in government programs and attempts to change labour legislation. Bryan Palmer (1986) described the protests and rallies that took place as evidence of growing class conflict. However, these events were exceptional. More often, the poor and the near-poor put up with their less advantaged position because they have few of the resources (for example, money, education, organizations) that make it possible to fight for social change (Brym, 1979). In fact, in the past decade, we have seen more opposition from a better-organized middle class in response to government cutbacks in health and education funding, and in support for seniors, than from the poor in response to welfare cutbacks. And we have witnessed intensified negative stereotyping of the poor and those on welfare, a process that Jean Swanson (2001) calls "poor-bashing."

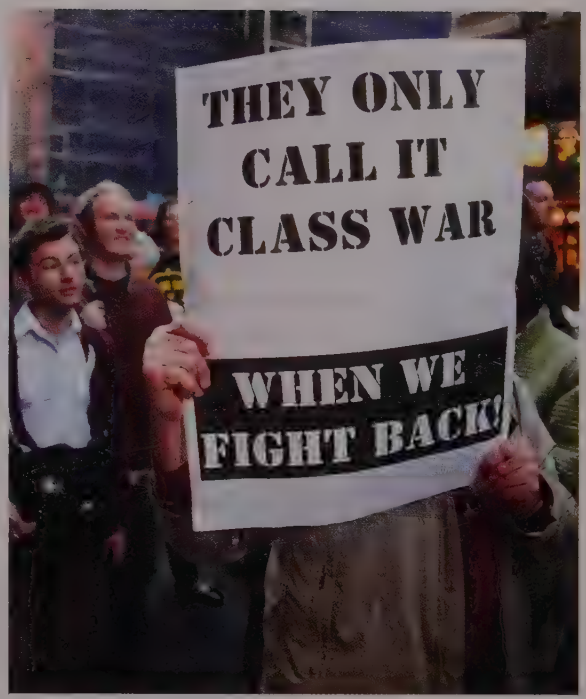
Several years ago, however, we saw the emergence of a remarkable new social movement, Occupy Wall Street, that brought together a wide range of individuals and groups, including middle-class, university-educated social activists and the homeless, all concerned about the growing level of social inequality in North America. The movement attracted a great deal of public attention, but after some time died down as other social, political, and environmental issues took centre stage. It remains to be seen whether this movement will have an impact on patterns of social inequality in Canada and elsewhere.

It is unlikely that growing social inequality and fewer opportunities for upward mobility will translate into widespread social unrest in Canada. However, at least one study shows that some workers are digging in for long struggles against the threat of job cuts (Brym, Birdsell Bauer, and McIvor, 2013). Moreover, it remains possible that coalitions of concerned citizens will have an impact on the long-term trend toward growing inequality and declining opportunities. For example, despite the declining strength of unions in North America, we are beginning to see some responses to social inequality from

the "social unionism" movement (Camfield, 2011; Krahn, Hughes, and Lowe, 2020: Ch. 11). Rather than focusing only on the needs of their members, some activist unions have begun making alliances with community groups and social justice organizations to implement social reforms in the broader community.

TIME FOR REVIEW

1. What do occupational, income, and unemployment trends in Canada over the past several decades tell us about Canada's social stratification system?
2. Are any of the theories of stratification discussed earlier in this chapter clearly supported or refuted by these trends? If yes, which theories, and how?
3. Why do you think most poor people are poor?
4. Does it really matter if material inequality increases in Canadian society? Why, or why not?



Protesters in the Occupy Wall Street Movement.
SOURCE: © Tomas Abad/Alamy.

RESPONDING TO INEQUALITY

Some people believe that more equal distribution of society's resources would be preferable to the current level of inequality. They believe that existing differences in life-chances are unjust and look for ways in which social institutions, laws, and tax systems might be changed to reduce material inequality. Others, equally offended by inequality and its consequences, reject this reformist approach in favour of a more radical position, advocating the replacement of capitalist society by some kind of socialist or social-democratic alternative.

Still others respond to evidence of extensive inequality with little ambition to change it, believing, simply, that this is "the way things are." Although perhaps bothered by its consequences, members of this group might still conclude that the existing level of inequality is inevitable and that well-intentioned efforts to reduce it will, in the long run, have little effect. They might even conclude that inequality is functional, as Davis and Moore (1945) argued 70 years ago, and that efforts to reduce it will be counterproductive. In short, reactions to inequality, and recommendations about what, if anything, should be done about it, reflect personal values and political orientations.

Assuming that a lower level of inequality is a goal worth striving for, it is clear that the government has a role to play in trying to reach that goal. The Canadian state has a significant impact on the distribution of wealth and income through tax systems that redistribute wealth from the rich to the poor (Fortin et al., 2012); through minimum-wage and other types of legislation; and through transfer payments, such as pensions for seniors and those with disabilities, social assistance for low-income individuals and families, and Employment Insurance. Even so, compared with some other industrialized countries, Canada spends considerably less on attempts to reduce poverty and inequality. Analysts estimate that nearly two-thirds of the increase in after-tax inequality that has occurred in Canada since 1981 would be eliminated if our tax and redistribution system was like that of Western European countries (Sharpe and Capeluck, 2012: 22).

However, Canada's welfare policies appear to be based on the belief that a relatively unregulated labour market will produce wealth and jobs that should, in time, trickle down to the poor (Esping-Andersen, 1990). Unfortunately, as our review of labour market trends indicates, there is little evidence that the free market has performed successfully in this regard. Instead, unemployment rates have risen, precarious employment has become more common, and social inequality has increased.

Furthermore, during the past several decades, the political mood has changed, and concerns about reducing government deficits, streamlining government, and making Canada more competitive in the global marketplace appear to have been influencing government policy more than concerns about reducing inequality. In fact, some deficit-reducing initiatives (for example, reductions in social-assistance payments) have led to increases in inequality, as have tax reform initiatives that have favoured the rich.

But twenty-first-century government policies do not necessarily require this tradeoff. For example, government-funded job-creation strategies may continue to be useful in the future, as they were during the aftermath of the global financial crisis of 2008–09. Revised tax policies that would raise corporate income taxes, increase the marginal tax rate for Canada's highest paid citizens, and eliminate some of the tax write-offs enjoyed by the upper and middle classes could also be useful. Support for affordable housing would also go a long way toward helping families build wealth (see Critical Sociology: Housing, Homelessness, and Canada's Commitment to Social Housing).

A large part of the problem lies, of course, in the fact that any serious effort to redistribute wealth and income from the well-off to the poor would probably be opposed by the former. If we really want to do something about material inequality in Canada and globally, if we want a different kind of society and a different kind of world, many of us—including the authors—have to be willing to accept less so that others can have more.

Critical Sociology

HOUSING, HOMELESSNESS, AND CANADA'S COMMITMENT TO SOCIAL HOUSING

In 2017, as part of the National Housing Strategy, the federal government committed $40 billion to social housing infrastructure to ensure access to adequate, affordable, and stable housing (Government of Canada, 2017). This action came after many years of what some refer to as a crisis of affordability in housing in Canada, evidenced by rising home prices, a lack of affordable housing, and an increasing rate of homelessness.

In 2016, almost one-quarter of Canadian households had monthly shelter costs of 30 percent or more of average monthly household income (the accepted definition of unaffordable housing) (Statistics Canada, 2017). Thirteen percent of households were in dwellings considered "unsuitable, inadequate or unaffordable" and unable to afford better alternatives (Statistics Canada, 2019o). In 2014, about 235 000 Canadians experienced homelessness. That is, they lived without shelter, in emergency shelters, or in provisional accommodations at some point in that year (Gaetz et al., 2016). In the same year, 8 percent of Canadians over the age of 14 reported that, at some point in their lives, they had to "temporarily live with family, friends, [or] in their car . . . because they had nowhere else to live" (Rodrigue, 2016).

Although the National Housing Strategy marked a departure after years of limited funding for housing, Canada has been committed to social housing (that is, subsidized, public, non-profit, and co-op housing for low- and moderate-income households) since the 1940s. After a modest start through the early post-war period, social housing entered its heyday in the 1960s and early 1970s. This period marked a rapid expansion of social housing, propelled by a federal agenda of welfare state expansion, increased urban growth, and surging industrialization (Suttor, 2016).

In the mid-1970s, social policy began focusing less on large government programs and more on non-profit involvement with an emphasis on mixed-income housing. The federal government essentially stopped building social housing developments and relied on non-profit organizations to fill the gaps by integrating low-income housing into larger developments. This emphasis continued through the 1980s as the federal government slowly decreased its role in providing social housing, shifting the responsibility to the provinces. Some federal grants for housing reappeared in the early 2000s, but little public housing has been built in Canada since the 1990s.

After so many years of retrenchment, the National Housing Strategy represents a shift in the federal government's support for social housing, taking a more active role with the goal of reducing homelessness and increasing affordability through the creation of new housing units and provision of financial support. Importantly, the National Housing Strategy also focuses on improving housing conditions for vulnerable populations that include survivors of family violence, northern and remote residents, new immigrants, the elderly, and people with disabilities.

Critical Thinking Questions

1. Why do some groups believe that a housing affordability crisis exists in Canada? What evidence supports this argument?
2. What makes the National Housing Strategy different from recent housing policy in Canada?

SUMMARY

1. **What is social stratification?**
   Social stratification refers to persistent patterns of social inequality. Some social hierarchies are based on ascribed statuses, such as gender, race, and age, which are typically assigned to an individual at birth. Other social hierarchies are based on achieved status, which indicates how well an individual has performed in some role.

2. **What are the main sociological theories that explain social stratification?**
   In his class-based theory of social stratification, Karl Marx emphasized the exploitation of the working class by the owners of the means of production and the potential for class conflict to generate social change. Max Weber also emphasized the power that resides in ownership of property but argued that hierarchies of prestige and political power are influential as well.

3. **Do any sociological theories argue that social stratification is useful?**
   The functional theory of social stratification suggests that inequality is both inevitable and necessary insofar as it ensures that the most qualified individuals are selected to fill the most important and rewarding roles. This theory downplays power differences and conflict between social classes.

4. **How do sociological theorists account for how society and the economy have changed over the past century?**
   Erik Olin Wright developed a class-based theory of stratification that adapts many of Marx's ideas to today's circumstances. Frank Parkin's approach follows in the footsteps of Weber by focusing on how some social groups exclude others from power. Pierre Bourdieu's explanation of how social inequality is reproduced across generations emphasized different forms of capital: economic, social, cultural, and symbolic.

5. **What can we learn about Canada's social stratification system by examining relevant data?**
   While studies of occupational mobility show that Canada is a relatively open society, strong evidence exists that class-based advantages are often passed from one generation to the next. Ownership of wealth and property in Canada remains highly concentrated, and income inequality is also relatively high. The poor and others near the bottom of the social hierarchies enjoy fewer life-chances than do the well-off. Because of their limited access to social and material resources, the poor have seldom become an active force for social change.

6. **Is social inequality decreasing, staying the same, or increasing?**
   Some theories of social stratification developed in the middle of the twentieth century suggested that inequality was declining as the North American economy expanded. However, the period of rapid economic growth that characterized the middle decades of that century appears to have ended. As unemployment rates have risen, as part-time and temporary jobs become more common, and as governments cut back on social-assistance programs while reducing taxes for the wealthy, evidence accumulates that material inequality is slowly increasing in Canada and also in other Western industrialized countries.

QUESTIONS TO CONSIDER

1. Does social class play a larger role than ascribed statuses (such as race, gender, and age) in determining patterns of inequality in Canada?
2. Use information provided in this chapter, as well as your own experience, to explain how advantages are passed from one generation to the next, resulting in persistent patterns of inequality.
3. Present arguments for and against why governments should play a significant role in addressing persistent patterns of social inequality.
4. What is poverty and how can it best be measured?

GLOSSARY

Absolute poverty (p. 161) is the state of existence of those who have so little income that they can barely stay alive.

Achieved status (p. 147) is a changeable status that is acquired on the basis of how well an individual performs a particular role.

Ascribed status (p. 147) is a status such as age, gender, or race that is assigned to an individual, typically at birth

The **bourgeoisie** (p. 150), according to Marx, is one of the two main classes in the capitalist mode of production. It comprises the owners of the means of production.

A **caste system** (p. 148) is a closed stratification system, like India's, with strict rules regarding the type of work that members of different castes (the strata of Indian society into which people are born) can do.

Circulatory mobility (p. 158) is the occupational mobility that occurs in a society when better-qualified individuals move upward to replace those who are less qualified and who must consequently move downward.

Class conflict (p. 150), according to Marx, is conflict between major classes in a mode of production. According to Marx, it eventually leads to the emergence of a new mode of production.

Class consciousness (p. 150), according to Marx, is the recognition by members of a class of their shared interests in opposing members of another class.

Class structure (p. 149) is the relatively stable economic hierarchy comprising different social classes.

In a **closed stratification system** (p. 148), little or no social mobility occurs because most or all statuses are ascribed.

Contradictory class locations (p. 154), according to Erik Olin Wright, are the locations within a class structure populated by occupational groupings with divided loyalties (for example, managers who supervise others yet report to owners).

Cultural capital (p. 156) refers to the knowledge and skill required to navigate the social world of the more advantaged people in society.

Economic capital (p. 156) consists of money, property, and other material assets. It is the core form of capital in contemporary society.

Exclusion (p. 155), according to Frank Parkin, is the organized effort by privileged, powerful groups to maintain their advantaged position.

Habitus (p. 156), according to Pierre Bourdieu, describes people's sense of how to cope or compete and succeed in a particular field of power.

Intergenerational occupational mobility (p. 158) refers to an individual's occupational mobility, either upward or downward, in relation to her or his parents' occupational status.

Intragenerational occupational mobility (p. 158) refers to an individual's occupational mobility, either upward or downward, within his or her own lifetime.

Life-chances (p. 152), according to Weber, are the opportunities (or lack thereof) for a higher standard of living and a better quality of life that are available to members of a given class.

The **low-income cutoff (LICO)** (p. 161), known unofficially as the "poverty line," is an estimate of the income level below which a person or family might be considered to be living in relative poverty. It is defined by Statistics Canada as the level of income at which more than 63 percent of income is spent on basic necessities.

The **means of production** (p. 150), according to Marx, constitute one of the main components of a mode of production, consisting of the technology, capital investments, and raw materials used in production.

A **meritocracy** (p. 147) is a society in which most or all statuses are achieved on the basis of merit (how well a person performs in a given role).

The **mode of production** (p. 150), according to Marx, is the system of economic activity in a society, comprising the means of production and the social relations of production (the class system).

In an **open stratification system** (p. 147), merit, rather than inheritance (or ascribed characteristics), determines social rank.

The **petite bourgeoisie** (p. 150), according to Marx, is a secondary class within the capitalist mode of production, including independent owners/producers (for example, farmers) and small-business owners.

Power (p. 146) is the ability to impose one's will on others.

The **proletariat** (p. 150), according to Marx, is one of the two main classes in a capitalist mode of production, comprising workers who exchange their labour for a wage.

Relative poverty (p. 161) is a state of existence in which individuals have significantly less income than most others have in their society, causing their lifestyle to be more restricted and their life-chances to be substantially curtailed.

Social capital (p. 156), according to Pierre Bourdieu, is composed of relationships with other individuals and groups that can help someone get ahead in life.

Social class (p. 149) is a position in an economic hierarchy occupied by individuals or families with similar access to, or control over, material resources.

Social closure (p. 155), according to Max Weber and Frank Parkin, refers to the methods used by relatively powerful groups to maintain their unequal access to status and resources, and to exclude others from such access.

Social mobility (p. 147) is the process whereby individuals, families, or other groups move up or down a status hierarchy.

Social relations of production (p. 150), according to Marx, are one of the main components of a given mode of production—specifically, the relationships between the main classes involved in production.

Social stratification (p. 145) refers to persistent patterns of social inequality perpetuated by the way wealth, power, and prestige are distributed and passed from one generation to the next.

Status (p. 147) is a culturally and socially defined position that a person occupies.

Structural mobility (p. 158) refers to the occupational mobility in a society resulting from changes in the occupational structure (for example, the upward mobility of many individuals resulting from the creation of more middle- and upper-level jobs).

Surplus value (p. 150), according to Marx, is the value of goods in excess of the cost of production, which takes the form of profit when the product is sold.

Symbolic capital (p. 156), including honours and prizes, involves social recognition of advantaged people.

Usurpation (p. 155), according to Frank Parkin, is the effort of excluded groups within a stratification system to gain advantages and power at the expense of more powerful groups.

CHAPTER 8

RACE AND ETHNIC RELATIONS

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AFTER READING THIS CHAPTER YOU WILL BE ABLE TO

- Compare and apply various theoretical approaches to understanding race and ethnic relations.
- Recognize race as a sociological construct, not a meaningful biological category.
- Contrast the main sociological interpretations of Indigenous people's socioeconomic status.
- Identify the social and historical roots of Quebec nationalism.
- Understand immigration's central role in Canadian social development.
- Describe what sociologists mean when they describe Canada as a vertical mosaic and outline how the vertical mosaic is being recast along racial lines.

INTRODUCTION

Canadians love to celebrate anniversaries. Whether they mark life events like birth, death, or weddings, organizational milestones like the Tim Hortons coffee chain's 50 years of business (2014), or cultural occasions like 100 years since women won the right to vote in federal elections (2018), anniversaries give meaning to life and are often happy affairs.

However, anniversaries that mark historical events like military battles or political processes are different because they often involve winners and losers. From a commemorative point of view, they can be characterized by conflicting emotions, and sometimes overt conflict. Canada's 150th anniversary in 2017 is a good example of how different perspectives can co-exist regarding how historical events ought to be marked.

According to tourism officials, the city of Ottawa hosted "many epic events in celebration of Canada's 150th anniversary of Confederation." More than 2.5 million people visited the city to take part in the fun. In the run-up to July 1, Canadian flags were reportedly flying off store shelves, indicating that normally reserved Canadians were eager to display their pride in the country. Canada is regularly ranked near the top of "best country in the world" lists, so many people felt it was a great occasion to celebrate our successes. Prime Minister Trudeau's famous 2017 tweet ("to those fleeing persecution, terror & war, Canadians will welcome you, regardless of your faith. Diversity is our Strength") was a clear reminder that our country is defined in part by our diversity and that we are more welcoming to newcomers than is our neighbour to the south.

But not everyone in Canada was stoked about Canada turning 150. Some people said that the anniversary was a Eurocentric way of marking time. After all, Indigenous people have been living on the land for "time immemorial," so to celebrate Canada's founding in 1867 erased their history. Others pointed out that while immigrants have helped make the country what it is, our history is also full of examples of intense racism directed against immigrants from Europe, Asia, Africa, the Caribbean and the Middle East. And, despite consistently topping "best country" rankings, many Indigenous people in Canada still live in poverty, many Indigenous communities do not have safe drinking water, and many hundreds of Indigenous women and young girls have gone missing or been murdered in Canada. Some people felt that with so many troubling events happening in the country, there was nothing to celebrate and so chose to sit out the July 1 celebrations (Satzewich, 2018).

The conflicting narratives about "Canada 150" are closely linked to immigration and race and ethnic relations issues. Between 2016 and 2017, police-reported hate crime increased by 47 percent. Most of the increase is associated with property crimes like graffiti and vandalism, and the main targets tend to be Muslims, Jews, and blacks in Ontario and Quebec, which of course are Canada's largest provinces by far (Statistics Canada, 2018a). In 2008, Toronto school trustees voted to establish a black-focused elementary school in the city. Critics argued that this was a step backward to racial segregation (Brown and Popplewell, 2008). The same debate rekindled in Toronto in 2011 with a proposal to establish a black-focused high school.

The Director of the Office of Independent Police Review found that the failure to properly investigate the deaths of a number of Indigenous youth in Thunder Bay, Ontario, was in part the result of racist attitudes and racial stereotyping within the city's police services (McNeilly, 2018). As of 2018, there were 481 outstanding land claims filed by Indigenous people against the federal government, with many more in the process of being submitted. At the current pace of resolution, it will be 2100 before most of them are dealt with (Frideres and Gadacz, 2012: 226). Arab Canadians complain that they have faced increased stereotyping and discrimination in Canada and at the Canada–U.S. border since September 11, 2001 (Li, 2003).

Some observers claim that the federal government's policy of multiculturalism undermines the unity of our country (Bissoondath, 1994), creates disloyalty to Canada, undermines foreign policy (Granatstein, 2007), and causes "more overt hostility in Canada to those of European ancestry . . . than to the nonwhite minority" (Stoffman, 2002: 126).

These examples say something about the distribution of power and resources in Canada. The sociology of ethnic and racial relations concerns primarily the study of how power and resources are unequally distributed among ethnic and racial groups. Sociologists who are interested in race and ethnic relations ask a number of interrelated questions: What are the conditions under which ethnic and racial groups come into contact? Which ethnic and racial groups hold most of the power in a society? How do they exercise power? Are there social and economic advantages associated

with particular ethnic or racial backgrounds? What are the social consequences of the unequal distribution of power and resources? How have ethnic and racial groups challenged inequality and power imbalances? How have governments tried to manage and contain ethnic and racial conflict?

My aim in this chapter is to provide sociological answers to these questions. I begin by examining what sociologists mean by ethnicity, race, and racism, and then discuss various theoretical approaches to the study of ethnic and racial relations. Next, I examine the three main forms of ethnic and racial relations in Canada: Indigenous/non-Indigenous relations, French/English relations, and immigrant/nonimmigrant relations. In each case, you will see how power and resource imbalances play important roles in structuring relationships among groups.

THE SOCIAL CONSTRUCTION OF DIFFERENCE

We use the terms *race*, *racial*, *ethnic*, and *ethnicity* in a variety of ways in our everyday lives. Some students in my classes talk about how they are under pressure from their parents to marry someone of the same "race" or "ethnicity." Others are concerned that "race relations" in Canada seem to be getting worse. Yet others describe the joys of living in a "multiethnic" country, of eating meals in a variety of "ethnic" restaurants, and of observing and participating in the rituals and festivals of "ethnic" groups from around the world.

The assumption underlying our commonsense understandings of these terms is that race and ethnicity are *ascribed* characteristics. That is, we assume that we are born with a certain race or ethnicity that cannot be changed. Sociologists, however, recognize that, although we cannot change our birth parents and generally cannot change our skin colour, we do not necessarily have fixed and unalterable ethnic and racial characteristics or identities. Instead, sociologists believe it is more useful to see race and ethnicity as *achieved* statuses—statuses that are acquired by virtue of social definition.

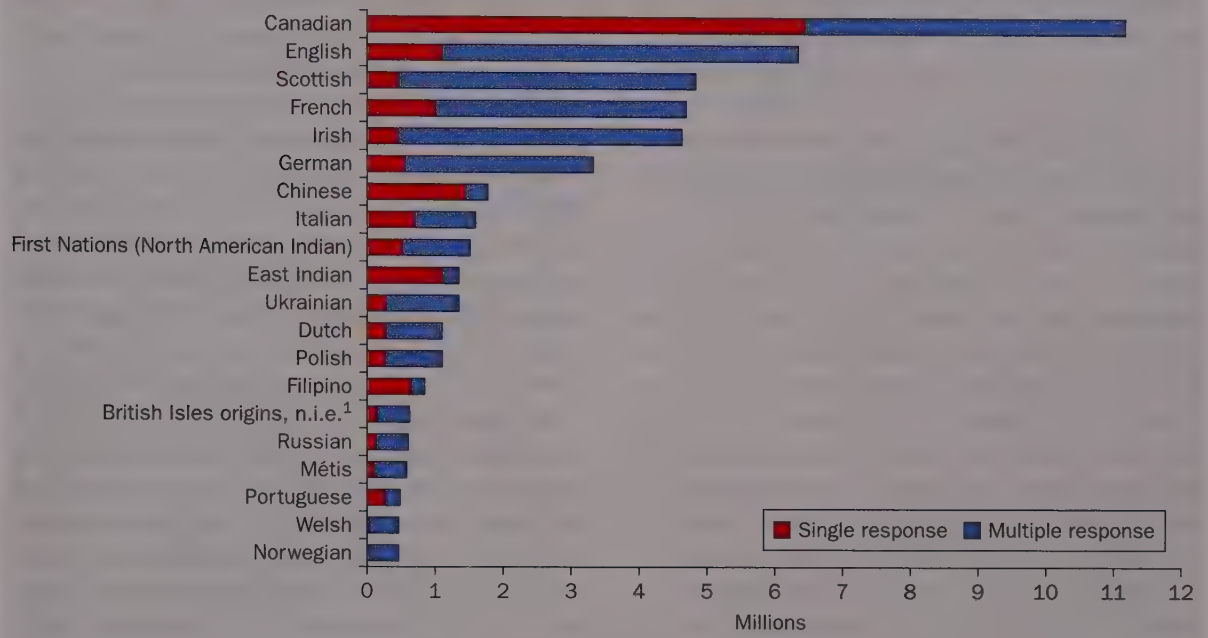
ETHNICITY

Sociologists do not agree on how to define and measure ethnicity. *Objective definitions of ethnicity* assume that ethnic groups exist because of people's social attachments (Isajiw, 1999). From this point of view, ethnicity is something that people possess because of differences in language, culture, customs, national origin, and ancestry. *Subjective approaches to ethnicity* focus on the process of ethnic identification. Sociologists who emphasize the socially constructed nature of perceived reality insist that ethnicity is a "transactional" process. Ethnic groups are made up of people who identify themselves, or who are identified by others, as belonging to the same ancestral or cultural group. Whether they display any of the cultural characteristics of the group with which they identify, or whether they are merely born into that group, is largely irrelevant. When subjective definitions are used, then, "ethnicity" is self-defined and reflects "a shared 'we-feeling' within a collectivity (groupness) whose symbolic components can vary [over] time and place" (Fleras and Elliot, 1996). From this perspective, ethnic identities and boundaries are situational, variable, and flexible.

Most of the ethnic categories that we take for granted are actually recent historical creations. The ethnic category "English" would have been unthinkable to a person who lived in the British Isles 800 years ago. People defined themselves, and were defined by others, as Celts, Saxons, Normans, and so on. Only some of those people came to be known as "the English" (Lieberson, 1991). Similarly, the people whom we now think of as "Germans" did not exist 150 years ago. As these examples suggest, the way in which people define themselves, and are defined by others, is in constant flux (Lieberson, 1991: 444). If we take a long view, it is common for ethnic categories and identities to be recast and created anew.

This is what seems to be happening in Canada now. A feeling of commonality has crystallized that is the basis for a common ethnic identification. In preparing for the 1991 census, Statistics Canada held meetings, organized focus groups, and tested different ways of posing questions that tried to measure the ethnicity of our population. One thing that Statistics Canada found "was a strong tendency [for respondents] to report Canadian as their ethnic origin and as their ethnic identity" (White, 1992: 166). Largely because of political pressure, "Canadian" was included as a response category in the ethnicity question for the next census. "Canadians" are now the numerically largest ethnic group in Canada (see Figure 8.1).

FIGURE 8.1 The 20 Largest Ethnic Groups in Canada, 2016 (in millions)



[1]"British Isles origins, n.i.e." includes general responses indicating British Isles origins (e.g., "British," "United Kingdom") as well as more specific responses indicating British Isles origins that have not been included elsewhere (e.g., "Celtic").

The Canadian census allows respondents to claim one or more ethnic ancestries. This figure enumerates those who claimed a single ancestry plus those who claimed multiple ancestries. So the numbers in this figure count responses, not individuals.

SOURCE: Statistics Canada. (2017a). *Census of Population*.

Why do some of us define our ethnic roots or ethnic identity as "Canadian"? Some of us may simply be unaware of or uninterested in our ancestral roots and, hence, by default define ourselves as Canadian. For others, defining ourselves as Canadian is a political act used to express our dissatisfaction with the government's policy of multiculturalism (White, 1992: 168–69). At the same time, though, many of us insist that we are Canadian because that is simply the group with which we identify and with which we share a sense of belonging (Angus Reid Group, 1991; Howard, 1998). The emergence of this sense of community means that "the ethnic English-Canadian is a new social creation" (Howard-Hassmann, 1999: 528).

RACE

For much of the twentieth century, there was little difference between commonsense understandings of **race** and the way that race was analyzed in the social and natural sciences. Most scientists believed that races were real and objective subdivisions of *Homo sapiens*. These divisions were supposedly based on a combination of unalterable physical and genetic characteristics. Features, such as skin colour, hair texture, body and facial shape, genetic diseases, metabolic rates, and distribution of blood groups, were used to construct various racial typologies. The most common typology was the division of humanity into "Caucasoid," "mongoloid," and "negroid" races (Montagu, 1972).

During the 1930s, scientists began to raise doubts about the scientific validity of the concept of race (Barkan, 1992). Since the 1950s, the scientific consensus has been that racial classifications of humanity are arbitrary, that genetic differences between groups are tiny, and that genetic differences are behaviourally insignificant (Montagu, 1972). Racial classifications based on a characteristic such as skin colour are as illogical as racial classifications based on the length of index fingers (Miles, 1982). Moreover, only a fraction of 1 percent of all human genes are necessarily shared

by members of the same race, genetically defined. So, from a strictly genetic point of view, Doug Ford, Premier of Ontario, may have more in common with black hockey star P. K. Subban of the New Jersey Devils than with white businessman David Thomson, the richest person in Canada.

In sum, genetic differences between races are arbitrary, extremely small, and without behavioural consequences. Ethnic boundaries and identities are flexible, negotiated, and historically variable. We should not conclude, however, that race and ethnicity are unimportant aspects of modern society. According to W. I. Thomas's famous sociological dictum, if people define situations as real, they are real in their consequences (Thomas and Znaniecki, 1918: 79). Even though race is a hollow biological concept, and even though ethnic identities and boundaries are neither fixed nor unchanging, many people believe in the existence of ethnicity and race, and organize their relationships with others on the basis of those beliefs. Therefore, race and ethnicity are important parts of our social reality.

RACISM

If race is a biological myth, what is racism? Is a school racist if it puts on hot dog days but not chow mein days? Was Professor Philippe Rushton of Western University a racist because he believed that black people have smaller brains than whites and Asians do? Is a black woman racist if she wants to marry only a black man? Is a white man racist if he wants to marry only a white woman? Was the Bush administration in the United States racist for the way that it managed the aftermath of Hurricane Katrina in New Orleans in September 2005? Is a candidate for an elected position racist if she encourages members of her racialized group to vote for her because of their common background?

Before we can begin to answer these kinds of questions, we need to define racism. Sociologists define racism as both a certain kind of idea and a certain kind of institutional practice. I will consider each of these definitions in turn.

Traditionally, sociologists defined racism as "the belief that humans are subdivided into distinct hereditary groups that are innately different in their social behaviour and mental capacities and that can therefore be ranked as superior or inferior" (Marger, 1997: 27). Some scholars have suggested that because ideas about the inherent superiority and inferiority of groups have been so thoroughly discredited, racism has taken new forms (Omi and Winant, 1986). Biological versions of racism may be dead, but researchers have developed the concept of "new racism" as a way of analyzing its changing manifestations (Adeyanju, 2010).

The concept of **new racism** was developed by Martin Barker (1981) to analyze the way that racist ideas were being expressed in the 1970s by some British members of Parliament (MPs) when they were speaking out against British immigration policy. That policy permitted people from former British colonies in Asia, Africa, and the Caribbean unrestricted entry into the country. In their speeches, the MPs did not refer to British biological superiority or to Indian, African, or Caribbean biological inferiority. Instead, they regarded immigrants from these areas as *culturally* different from British people and alleged that the ability of British people to continue to advance the moral level of humanity was being undermined by immigration policy. The MPs' statements could not be considered "racist" by the traditional definition of the term. However, the statements had the consequence of helping to stop almost all nonwhite immigration from those countries.

These events suggested that the definition of racism had to be broadened. Accordingly, Barker (1981: 21) argued that the new racism involves the belief that although races of people cannot be ranked biologically, they are different from each other and that social problems are created when different groups try to live together. These beliefs should be considered racist because of their underlying intent: to socially exclude, marginalize, and denigrate certain groups of people but to do so without reference to unalterable biology. People may even believe in abstract virtues, such as equality, justice, and fairness, yet still hold negative attitudes, and engage in discriminatory behaviour, toward minority group members (Henry and Tator, 2006: 19).

How widespread is racism? One survey (Leger Marketing, 2007) found the following:

- 9 percent of Canadians considered themselves strongly or moderately racist.
- Men are more likely than women are to describe themselves as moderately racist (10 percent versus 6 percent of women).
- 21 percent of Canadians believed that some races are more gifted than others are.
- 9 percent of Canadians would react negatively if their child married someone of a different race.

- 92 percent of Canadians have witnessed comments or behaviours that they regard as racist.
- 17 percent of respondents believe that their city is more racist than it was 10 years ago.

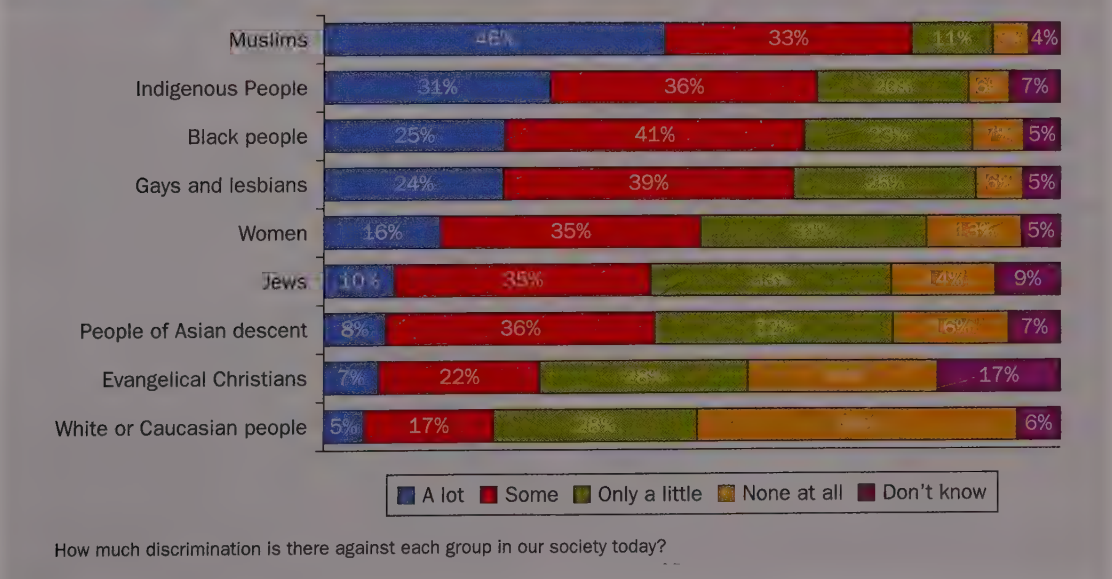
A different indicator of the scope of racism in Canada is given in Figure 8.2, which focuses on *perceived* discrimination. This figure shows that in 2016, Canadians perceived that discrimination against various groups occurs frequently in Canada. The proportion of Canadians who thought that Muslims experience "some" or "a lot" of discrimination was 80 percent. The corresponding percentages for Indigenous people and black people were 67 percent and 66 percent, respectively.

We must be careful to distinguish perceptions of discrimination from actual discrimination. An individual may overestimate or underestimate the actual level of discrimination against a particular group because of his or her level of education, the degree to which the mass media bias his or her perceptions, and other factors. Sociologists measure the *actual* level of discrimination against a group using objective factors. For example, do people from different ethnic or racial groups earn different average annual incomes? If so, how much of the difference is *not* the result of their average level of education, years of work experience, and other factors that generally explain earnings? The unexplained difference is arguably a measure of actual discrimination. To what degree does this difference persist beyond the immigrant generation? The degree of persistence indicates how deeply rooted discrimination is. Later, we analyze such objective measures of discrimination in Canada.

An important type of actual discrimination is **institutional racism**, or "discriminatory racial practices built into such prominent structures as the political, economic and education systems" (Doob, 1996: 6). Institutional racism can take three forms:

1. Some institutional practices are based on explicitly racist ideas. Chinese people were excluded from certain jobs and were denied the right to vote in federal elections until 1947. Japanese Canadians were denied their basic civil rights, were forcibly expelled from the west coast of British Columbia, and had their property confiscated during World War II (Bolaria and Li, 1988). Most status Indians were denied the right to vote in federal elections until 1960. Residential segregation was widespread for black people living in Canada. "Restrictive covenants" in wills, deeds, and leases were used to ensure that property could not be sold or leased to blacks and Jews. Blacks were frequently refused service in restaurants, theatres, and recreational facilities (Henry and Tator, 2006: 69). Canada had the worst record

FIGURE 8.2 Perceptions of Discrimination in Canada, 2016



SOURCE: Bruce Anderson and David Coletto. (2016). "Muslim and Indigenous People Face the Most Discrimination in Canada According to Canadians." *Abacus Data*. Ottawa: Abacus Data. At http://abacusdata.ca/muslims-and-indigenous-people-face-the-most-discrimination-in-canada-according-to-canadians.

of all Allied countries of not allowing Jewish immigration during World War II, when millions of Jews were being gassed in Europe (Abella and Troper, 1982). In each case, ideas about the alleged inferiority of certain groups underpinned institutional practices.

2. Some institutional practices arose from, but are no longer sustained by, racist ideas (Miles and Brown, 2003). For example, in 1966, the federal government admitted a small number of black workers from the Caribbean to work on Canadian farms during warm months. Now, more than 35 000 migrant workers from the Caribbean and Mexico enter Canada each year to harvest fruits, vegetables, and tobacco in Ontario and other agricultural areas. Canadian government officials originally justified this practice partly by arguing that black workers are racially suited to back-breaking labour under the hot sun but racially unsuited to cold Canadian winters (Satzewich, 1991). The present migrant-labour policy had its origins in racist thinking, but racist ideas are no longer used to justify this migration stream.
3. Institutions sometimes unintentionally restrict the life-chances of certain groups through a variety of seemingly neutral rules, regulations, and procedures. This is sometimes referred to as *systemic discrimination*. For example, height and weight requirements for jobs with police forces and fire departments did not necessarily originate in racist ideas, but these requirements meant that for many years, certain groups could not get jobs as police officers or firefighters. Word-of-mouth recruiting in organizations and inflated educational requirements for nontechnical jobs are also forms of systemic discrimination because they unintentionally put minority groups at a disadvantage (Special Committee on the Participation of Visible Minorities in Canadian Society [Special Committee], 1984).

   Police forces in Canada and in many other countries are often accused of this form of discrimination when they engage in what is informally known as "carding" (Satzewich and Shaffir, 2009). Carding involves police officers randomly stopping and questioning someone, even when that person does not appear to be doing anything wrong. When doing so, police often record the details of the person they stopped, including their name, age, estimated height and weight, perceived skin colour, and the names of their friends. These police practices, although motivated by the desire to gather intelligence about communities and potential patterns of criminality, tend to disproportionately target black and Indigenous people. Within these communities, carding leads to feelings of being discriminated against, which in turn leads to heightened levels of distrust of the police (Tulloch, 2018).

   Concerns about racist policing practices and other forms of violence stimulated the formation of Black Lives Matter, a social movement dedicated to combatting violence against black people. Black Lives Matter emerged in the United States in 2013 in response to the acquittal of a Florida man who shot teenager Trayvon Martin. Since then, the movement has spread to other countries, including Canada, where it remains active in combatting anti-black racism (Black Lives Matter—Toronto, 2019).

TIME FOR REVIEW

1. In what sense are race and ethnicity socially constructed?
2. What is the difference between perceived and actual discrimination?
3. What is institutional racism and what are its main forms?

THEORIES OF RACE AND ETHNIC RELATIONS

There are numerous sociological interpretations of race and ethnic relations (Rex and Mason, 1986). In this section, I discuss four approaches that seek to explain various forms of ethnic and racial hostility. Such hostility is multifaceted and, depending on the circumstances, is described as racism, prejudice, ethnocentrism, or xenophobia.

SOCIAL PSYCHOLOGY

Social-psychological theories of race and ethnic relations focus on how **prejudice**—an unfavourable, generalized, and rigid belief that is applied to all members of a group—and racism satisfy the psychic needs of certain people. The *frustration–aggression thesis* is a popular variant of social-psychological theory. It explains prejudice and racism as forms of hostility that arise from frustration. The theory suggests that people who are frustrated in their efforts to achieve

a desired goal—a better-paying job, for example, or entry to a university—respond with aggression (Marger, 1997). Since the real source of frustration is usually too powerful to confront directly, or may not be known, people take out their frustrations on the less powerful. From this perspective, minority ethnic and racial groups are convenient and safe targets of displaced aggression. This displacement is also referred to as *scapegoating*. The concept of scapegoating is sometimes used to explain anti-Semitism—negative attitudes and everyday discrimination directed against Jews (Brym and Lenton, 1993).

This kind of explanation has a commonsense appeal. We all have bad days at work or at school, and when we get home, we sometimes lash out at the people close to us. However, the theory has limitations. First, people respond to frustrating circumstances in a variety of ways. Displaced aggression does not always follow frustration. We sometimes internalize frustrations and end up giving ourselves an ulcer, or we may direct our frustrations at the real source of our problems. The theory does not say why we respond to frustrating circumstances in different ways. Second, the theory does not explain why some groups, and not others, are chosen as scapegoats.

PRIMORDIALISM

Primordialist theory argues that ethnic and racial attachments reflect an innate tendency for people to seek out, and associate with, others who are similar in terms of language, culture, beliefs, ancestry, and appearance (Scott, 1990). From this point of view, ethnic prejudice and racism are ways of maintaining social boundaries.

Sociobiologists offer a popular form of primordial theory. They suggest that prejudice and **discrimination**—practices that deny members of particular groups equal access to societal rewards—stem from our supposedly biologically grounded tendency to be nepotistic. Sociobiologists argue that the process of natural selection does not operate at the level of individuals, but rather at the level of kin groups. Clusters of genes are assumed to be passed on through kin selection (Wilson, 1978). Ethnic and racial groups are seen to be nothing more than large extended families. Since people have a "natural" tendency to want to pass on their genes, they favour their own "families." So people are inherently both altruistic (prepared to sacrifice their own individual interests for the sake of the group) and ethnocentric because they want to pass on their genes only to their own group. Humans, therefore, naturally favour members of their own ethnic or racial group—their "relatives"—and have a natural distrust and dislike of "nonfamily" members (van den Berghe, 1986: 255).

Are racism, prejudice, and discrimination programmed by our genes? It seems unlikely. The first problem with sociobiology is that shared ethnicity or race does not prevent conflict from erupting. White workers have struck against white-owned factories, and people have killed members of their own ethnic or racial group without concern for common ethnicity or race (Bonacich, 1980). Second, sociobiology is not able to explain how and why we frequently break out of our supposed genetically programmed nepotism. For example, Canadians of diverse ethnic and racial origins participate together in various kinds of anti-racist social movements (Henry and Tator, 2006). Ethnic and racial relations, therefore, are not necessarily zero-sum games in which one group wins at the expense of another.

NORMATIVE THEORIES

Normative theories of ethnic and racial prejudice concentrate on the way in which prejudice is transmitted through socialization and the social circumstances that encourage discriminatory behaviour (Marger, 1997). For example, the *socialization approach* focuses on how we are taught ethnic and racial stereotypes, prejudices, and attitudes by our families, peer groups, and the mass media. For instance, as a teenager in Saskatchewan in the 1970s, I remember watching the TV show *All in the Family*. People in Saskatchewan at the time held many prejudicial attitudes, particularly toward Indigenous peoples. However, the television program *All in the Family* exposed my generation to a repertoire of ethnic and racial slang and stereotypes that we had not heard before. Archie Bunker, the show's central character, was supposed to be a caricature of an American "bigot," but he also taught us terms like "wop," "dago," and "spic," and the corresponding stereotypes.

Socialization theories are superior to social-psychological and primordialist approaches because they emphasize the way in which ethnic and racial prejudices and attitudes are learned through social interaction. **Power-conflict theories of ethnic and racial prejudice** go a step farther by explaining how prejudicial ideas, attitudes, and practices arise in the first place.

POWER-CONFLICT THEORIES

Karl Marx (1967 [1867]: 751) wrote that "the turning of Africa into a warren for the commercial hunting of black-skins signaled the rosy dawn of the era of capitalist production." Marx did not take his analysis of slavery and racism much further than that. Later generations of Marxist scholars, however, have sought to link racism to the structure of capitalist societies.

Orthodox Marxists argue that racism is an *ideology*—a set of ideas shaped by economic interests about the way the social world works. Racism is ideological insofar as it is used by capitalists to mystify social reality and justify the exploitation and the unequal treatment of groups of people.

This justification can take many forms. For example, in the seventeenth century, American and Caribbean plantation owners justified the use of Africans as slaves by denying the humanity of Africans (Williams, 1964). In Marxist terms, the existence of racist ideas did not cause slavery; rather, slavery was a particular system of labour control that was justified by racist ideology. In that context, racism also interacted with Christian religious theology and was used by White Europeans to "explain" what they saw as their own social and economic superiority and to moderate any feelings of potential guilt over the treatment of racialized groups (Allahar, 1993).

In the case of advanced capitalism, racism is viewed by Marxists as an ideology that justifies the especially intense exploitation of racial minority and immigrant workers (Bolaria and Li, 1988; Castles and Kosack, 1984). From this point of view, racist ideas are used by employers as a means of creating artificial divisions in the working class so as to prevent the formation of a class consciousness that would threaten the social and economic order (Bolaria and Li, 1988; Castles and Kosack, 1984; Nikolinakos, 1973). Racist ideas can also help to justify the allocation of certain groups to low-wage, socially marginal jobs.

Traditional Marxist approaches to racism seem problematic because they lend themselves to images of capitalists sitting around secret conference tables deliberately plotting how they can use racism to their advantage (Bonacich, 1972; 1979). At the same time, we should not dismiss the fact that **populist political parties** are gaining in popularity in many countries around the world. Populist leaders like President Trump in the United States, President Bolsonaro in Brazil, and Prime Minister Viktor Orbán in Hungary use racist ideas and ideologies that blame immigrants for domestic social problems as a way to garner political support for various policies and drive wedges between different groups of people (Vieten and Poynting, 2016).

Other versions of power conflict theory have distanced themselves from some of the more conspiratorial overtones of Marxism. They suggest more broadly that (1) individual racism, ethnic prejudice, and institutional racism emerge from intergroup conflict; (2) prejudicial ideas and discriminatory behaviour are ways of socially marginalizing minority groups that the dominant group sees as threats to their position of power and privilege; and (3) to understand ethnic and racial relations, we need to look beyond individual personalities and sociobiological processes and analyze processes of economic, social, and political competition among groups (Marger, 1997: 98).

Keeping these three observations in mind will help you understand the three main patterns of ethnic and racial relations in Canada: Indigenous/non-Indigenous relations, French/English relations, and immigrant/nonimmigrant relations. These are the topics that we turn to next.

TIME FOR REVIEW

1. How do the main theories of race and ethnic relations differ from one another?
2. Which theory best explains patterns of race and ethnic relations? Why?

INDIGENOUS PEOPLES

Have you ever fumbled trying to find the right way to refer to someone who is ethnically or racially different from you? Are we supposed to say that a person is a "Native," an "Indian," an "Indigenous" person, or a member of the "First Nations"? Are you sensitive about how you want others to refer to your ethnic or racial origins? You may think that this sensitivity is an indication that political correctness has run amok. However, you should not dismiss the issue of labels and names easily.

Ethnic and racial labels are about power. Take the term *Indian*. A hopelessly lost Christopher Columbus thought he had found a sea route to India when he was discovered in 1492 by people indigenous to this part of the world. He mislabelled them "Indians." Britain's military, political, and economic domination of North America in the eighteenth century meant that it had the power to ignore the linguistic and cultural

differences among indigenous groups and define them in any way they saw fit. They chose the term *Indian.*

As Indigenous people have acquired more power, they have begun to challenge externally imposed labels. In the 1980s, for example, the National Indian Brotherhood renamed itself the Assembly of First Nations, and people in Alberta who were called Sarcee Indians by Europeans for most of the twentieth century now refer to themselves as Tsuu T'ina, which means "Earth People" in English (Steckley 2003: 7). Groups have rejected externally imposed labels as part of a search for forms of consciousness, identity, and culture that are untainted by the colonizing power's definition of the situation (Jenson, 1993).

One, albeit imperfect, way to navigate through the complex issue of naming is to use the definition of "Indigenous peoples" in the 1982 Canadian Charter of Rights and Freedoms. In the Charter, the "Indigenous peoples" of Canada include Indians, Inuit, and Métis. In 2016 there were 970 562 registered Indians, 587 545 Métis, and 65 025 Inuit who, together, made up 4.7 percent of the population of Canada (Indigenous and Northern Affairs Canada, 2018; Statistics Canada, 2017b).

At its simplest level, the term *Indian* (or *status* or *registered Indian*) refers to people who are recognized as "Indians" by virtue of the federal government's Indian Act. Many people now use the term "First Nations" to refer to Indians. But deciding who is a member of a First Nation (or an Indian under the Indian Act) is a much more complicated question. Until 1985, Indian women who married non-Indian men, along with their children, lost their federally recognized Indian status; they became *non-status Indians.* In 1985, Bill C-31 was passed. It allowed these women and their dependent children to regain their Indian status. First Nation bands, however, now have the power to develop their own membership codes. This means that not all individuals who have had their Indian status reinstated are members of an Indian band (Frideres and Gadacz, 2012).

There are two definitions of *Métis.* Métis organizations in western Canada tend to focus on a person's objective "roots" as the condition for being considered Métis. Thus, the Métis National Council defines the Métis as "descendants of the historic Métis who evolved in what is now western Canada as a people with a common political will" (Métis National Council, 1983). The Congress of Indigenous Peoples uses a broader definition, suggesting that the Métis should include descendants of the historic Métis in western Canada *and* anyone of mixed European-Indian ancestry who defines himself or herself as Métis (Congress of Indigenous Peoples, 2008). Subjective definitions of ethnic group membership are more important for the Congress of Indigenous Peoples.

Until Bill C-31 was passed in 1985, Indian women who married non-Indian men, along with their children, lost their federally recognized Indian status. First Nation bands now have the power to develop their own membership codes.

SOURCE: © Alina Reynbakh/Shutterstock.

Finally, *Inuit* are part of a diverse group of people who have lived for many centuries north of the tree line. In Canada, the name *Inuit* has replaced the earlier name *Eskimo.* The language of the Inuit is Inuktitut (McMillan, 1988: 240).

EXPLANATIONS OF INDIGENOUS CONDITIONS

The socioeconomic conditions of Canada's Indigenous peoples are a national tragedy (Royal Commission on Indigenous Peoples, 1996). Canada has made admirable efforts to condemn social inequality and the denial of human rights in other countries, such as South Africa when apartheid—the policy of legalized racial separation and inequality—was still in force. Ironically, though, the commitment to social justice for Indigenous peoples in our own country has not been as strong, which is why, in the 1980s, the South African government routinely defended itself against our criticisms by saying that we should first clean up our own backyard (Bourgeault, 1988; York, 1989).

Statistical evidence shows that Indigenous peoples are the most socially and economically disadvantaged groups in the country. Indigenous peoples are massively overrepresented in the ranks of Canada's prison population. Even though they comprise less than 5 percent of the total population of Canada,

Indigenous people make up about 25 percent of population in both federal and provincial jails (Department of Justice, 2017). One way to measure the differences in living and socioeconomic conditions between First Nations and Inuit communities and the rest of Canada is through the *Community Well-Being* (CWB) *Index*. The index uses four indicators—level of education, labour force activity, income, and housing conditions—to measure the well-being of communities in Canada. Figure 8.3 indicates that while significant improvements in overall well-being were achieved in First Nations communities in the 1980s and 1990s, the degree of improvement levelled off in the 2000s. Moreover, the gap between the well-being of First Nations and non-Indigenous communities is stubbornly persistent.

For many years, Canadian politicians, bureaucrats, and social scientists have debated how inequalities between Indigenous peoples and other Canadians originated, why they persist, and what can be done to lessen them. Indeed, when the federal government announced in 1991 the establishment of the Royal Commission on Indigenous Peoples, Ovide Mercredi, then chief of the Assembly of First Nations, caustically commented that "Indians have been studied to death."

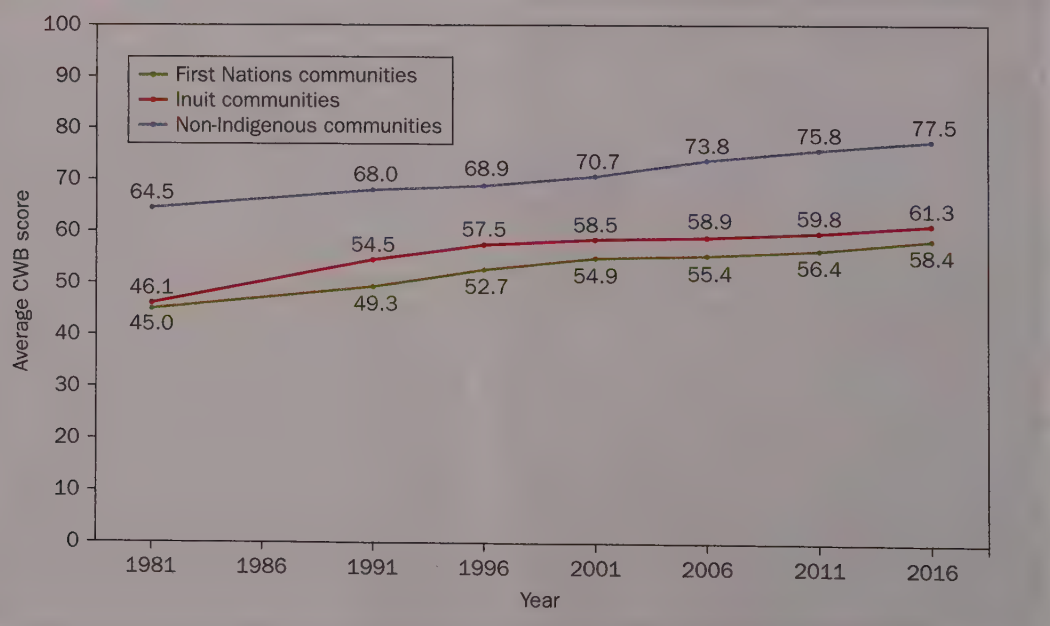
I want first to consider the federal government's historical explanation of these conditions. Then I will examine two sociological explanations: the culture of poverty thesis and conflict theory.

The Government's View

Throughout the first half of the twentieth century, government Indian policy was premised on the belief that First Nations culture was both different from and inferior to European culture. Armed with this ethnocentric attitude, the federal government sought to assimilate First Nations into mainstream Canadian society (Gibbins and Ponting, 1986). In 1920, this approach was summed up as follows by Duncan Campbell Scott, the deputy minister of the federal government's Department of Indian Affairs: "[O]ur object is to continue until there is not a single Indian . . . that has not been absorbed into the body politic and there is no [longer an] Indian question" (quoted in Titley, 1986).

The government, therefore, forcibly tried to Europeanize First Nations people and culture. Traditional cultural practices, such as the potlatch, a winter exchange of gifts and property on the British Columbia coast, and the sun dance, a summer solstice religious ceremony on the prairies, were outlawed. Such practices were regarded as pagan, anti-capitalist rituals that inhibited the development of both Christianity and a capitalistic work ethic (Cole and Chaikin, 1990; Pettipas, 1995).

FIGURE 8.3 *Community Well-Being Index*, First Nations, Inuit, and Non-Indigenous Communities, 1981–2016



SOURCES: Indigenous and Northern Affairs Canada. (2019). "The Community Well-Being Index: Report on Trends in First Nations Communities, 1981–2016." Statistics Canada, *Census of Population* for 1981–2006 and 2016, and the 2011 *National Household Survey*; https://www.aadnc-aandc.gc.ca/eng/1345816651029/1345816742083.

The federal government also tried to assimilate and Christianize First Nations children by establishing a series of residential schools. These boarding schools were located far from the children's families and home communities. While in school, the children were forbidden to speak in their mother tongue and to speak with siblings of the opposite sex, and they had their hair shorn. Boys were given extensive training in manual labour and girls were taught domestic labour skills. The goal of this schooling was to resocialize First Nations children and to instill in them a new European identity (Titley, 1986). The government's legislative, regulatory, and educational approach to First Nations reflected the view that inequality, poverty, and poor social conditions were rooted in Indigenous cultural and racial inferiority.

The Culture of Poverty Thesis

In the 1960s and 1970s, many sociologists also saw Indigenous culture as the source of the "Indian problem." To account for the origins and persistence of the problem, some sociologists proposed a variant of the **culture of poverty thesis**. The concept of a culture of poverty was first developed by Oscar Lewis (1961), an American anthropologist interested in explaining the slow pace at which Mexican Americans and Puerto Ricans were being assimilated into U.S. society. He suggested that some ethnic groups do not readily assimilate, and hence are poor because their culture does not value economic success, hard work, and achievement.

Kazemipur and Halli (2000) have applied Lewis's framework to the issue of ethnic poverty in Canada, and Nagler (1972) has applied it to the conditions of First Nations people. More recently, Frances Widdowson and Albert Howard (2008) have argued that because many First Nations people participate in modern society as consumers rather than producers, they remain stuck at an earlier, "Neolithic" stage of human development:

> Isolation from economic processes has meant that a number of Neolithic cultural features, including undisciplined work habits, tribal forms of political identification, animistic beliefs, and difficulties in developing abstract reasoning, persist despite hundreds of years of contact (Widdowson and Howard, 2008: 13).

They argue that the cultural gap between First Nations and the rest of the Canadian population prevents the integration of the former and is responsible for many of the social problems in their communities.

Some sociologists, such as Stephen Steinberg (2001), criticize culture of poverty explanations by showing that groups generally do not get ahead or lag behind because of their cultural values. Instead, they are born into certain stations in life and adopt the values and attitudes that are consistent with their life-chances. If First Nations peoples have low aspirations, it is likely the result of a realistic assessment of their dismal job prospects and a resignation born out of bitter personal experience. For Steinberg, the culture of poverty is the consequence, not the cause, of poverty.

Conflict Theory

Since the 1970s, sociologists have focused on blocked opportunities rather than culture as the explanation for inequalities between Indigenous and non-Indigenous peoples. The *colonization model* is the most popular variant of the conflict approach (Frideres and Gadacz, 2012). The colonization model analyzes the problem of inequality in terms of power imbalances and the exploitation of Indigenous peoples and lands by white society.

Theorists of colonization argue that the Indian Act, which outlines the federal government's policies and procedures for dealing with Indian issues, is a paternalistic document that disempowers Indian people (Frideres and Gadacz, 2012). It places limits on the actions of both individual Indians and their band councils. For instance, when Indians from Brantford, Ontario, wanted to sue the federal government over unfulfilled treaty promises in the 1920s, the government passed a law making it illegal for them to use band funds to hire lawyers to pursue their claims (Titley, 1986).

Indians did not get much help from federal or provincial/territorial politicians either. Since most Indians could not vote in federal or provincial/territorial elections until the 1960s, politicians had no need to stand up for the interests of Indians who lived in their constituencies. Chiefs who failed to cooperate with the government's designs were routinely removed from their positions (Satzewich and Mahood, 1994). Band councils are still required to have their decisions approved by the federal minister of Crown–Indigenous Relations and Northern Affairs Canada. Thus, rather than helping to create the social conditions that would afford Indian people greater autonomy over their lives, government policy has fostered social marginality and dependence. This is why many Indian leaders have called for the abolition of the Indian Act.

Furthermore, most present-day conflicts between Indigenous peoples and various levels of government originated in the past misuse of power by government officials. In some cases, present-day land-claim disputes go back a hundred years, when government officials could arbitrarily lop off chunks of Indian reserve land and sell it to whites (Frideres and Gadacz, 2012). The Canadian government and private business have derived tremendous economic benefits from the exploitation of land appropriated from Indigenous communities (see Critical Sociology: Bad Policing or Risky Behaviour?).

Critical Sociology BAD POLICING OR RISKY BEHAVIOUR?

The 2014 RCMP report *Missing and Murdered Aboriginal Women* is disturbing reading. The report notes that between 1980 and 2012, 1181 Indigenous women were homicide victims. Making up about 4 percent of Canada's female population, they comprised 16 percent of all murdered Canadian women over that period. Moreover, the situation seems to be getting worse. In 1984, Indigenous women were 8 percent of female homicide victims, but by 2012 that figure had climbed to 23 percent (Royal Canadian Mounted Police, 2014: 7–10). The report also showed that there were 164 missing Indigenous women, then constituting about 11 percent of all missing women in the country (Royal Canadian Mounted Police, 2014: 8).

The causes of crime are complex, as are the reasons why some people go missing. The RCMP report identifies three "risk factors" that contribute to the high rate of victimization of Indigenous women: poor employment conditions and opportunities; the consumption of drugs, alcohol, or other intoxicants prior to the incident; and involvement in the sex trade (Royal Canadian Mounted Police, 2014).

The RCMP report followed on the heels of another report by the Special Parliamentary Committee on Violence against Indigenous Women. The Committee report tried to place the problem in a larger social and historical context. It argued that the "root causes" of violence against Indigenous women include the legacy of Indigenous children being removed from their families and their culture by the government and placed in church-run boarding schools; persistent poverty and poor housing conditions; and widespread racism in Canadian society (House of Commons, 2014).

Not everyone was pleased with the RCMP report because it was silent on the larger context contributing to violence against Indigenous women. Some people called the Special Committee's report a whitewash because of its timid recommendations for improving the situation; rather than demanding a national inquiry and a comprehensive national action plan, the committee merely recommended that the federal government "learn from the stories of missing and murdered Indigenous girls and work . . . to create a public awareness and prevention campaign focusing on violence against Indigenous women and girls in Canada" (Special Committee on Violence Against Indigenous Women, 2014: 43).

According to Human Rights Watch (a nongovernmental agency that monitors human rights abuses around the world), one of the glaring silences in both reports concerns the role that the police may play in the victimization of Indigenous women. Human Rights Watch (2013) argues that a big part of the problem is that police do not take the issue of violence against Indigenous women seriously. To support their claim, they document cases in which Indigenous women are sexually and racially abused by the police.

In September 2016, the federal government launched a National Inquiry into Missing and Murdered Indigenous Women and Girls. Its mandate is to

> . . . look into and report on the systemic causes of all forms of violence against Indigenous women and girls, including sexual violence. We must examine the underlying social, economic, cultural, institutional, and historical causes that contribute to the ongoing violence and to particular vulnerabilities of Indigenous women and girls in Canada (National Inquiry into Murdered and Missing Indigenous Women and Girls, 2019).

The main work of the inquiry has been to cross the country gathering stories of survivors and families of victims in the hope that public education will help spark more dialogue about how to curtail the violence. One can only hope that their reports and recommendations will not gather dust on politicians' shelves.

Critical Thinking Questions

1. From an investigative point of view, do police agencies take cases of missing Indigenous women as seriously as those of non-Indigenous women?
2. What changes should police forces make to better address the issue of murdered and missing Indigenous women and young girls?

CLASS AND GENDER DIVERSITY

Criticisms of the internal colonial model have focused on its tendency to overgeneralize about the conditions of Indigenous people in Canada. As significant as inequalities between Indigenous and non-Indigenous peoples are, conflict and feminist sociologists argue that it is worth remembering that socioeconomic diversity also exists within Indigenous communities. These sociologists analyze class and gender differentiation within Indigenous communities and the implications of such differences for both individual life-chances and wider community life (Satzewich and Wotherspoon, 2001; Voyageur, 2008).

Feminist sociologists have been interested in the role of gender in recent debates about the inclusion of the right to self-government in the Canadian Constitution. During the debate over the Charlottetown Accord in 1992, many Indigenous women were concerned that the proposal for self-government, which was advanced by the predominantly male leadership of their organizations, did not contain any guarantees of gender equality (Fiske, 1996; Krosenbrink-Gelissen, 1994: 357–60). The Native Women's Association of Canada, therefore, fought against the accord in the months leading up to the referendum.

Other conflict theorists are interested in the political and economic implications of socioeconomic differentiation within Indigenous communities. Researchers challenge the stereotype that all Indigenous people are either poor, unemployed, living on welfare, or working in low-skill, dead-end jobs. In fact, a small but significant and growing proportion of Indigenous men and women work in skilled professional and technical occupations, and others are owners or managers of small and large businesses (Gerber, 1990). Menno Boldt (1993: 124) argues that most Indian reserves are characterized by a two-class social order (see also Alfred, 1999). One class consists of "a small, virtually closed élite class comprising influential landowners, politicians, bureaucrats, and a few entrepreneurs," while the second consists of "a large lower class comprising destitute, dependent, powerless [and wage-earning] people" (Boldt, 1993: 124). Boldt argues (1993: 125) that this two-class structure has important consequences for community life and politics:

> With the élite class controlling the political agenda, lower-class interests get neglected. Elite class interests tend to be primarily "power" not "problem" oriented; that is, such interests are related to expanding their jurisdiction and control over band/tribal political and administrative structures. . . . [These] are given preference over the problems that afflict the Indian lower class: high unemployment; excessive rates of family disintegration; alcohol and substance abuse; extraordinary levels of violence, suicide, incarceration, and so on.

Land-claim settlements and rising educational levels explain the growth not just of Indigenous elites but of an Indigenous middle class, too (Mitchell, 1996; Wotherspoon, 2012). Although overall educational levels among the three Indigenous groups in Canada lag behind those of the general population, some Indigenous people are able to achieve a high level of education. Among the total Canadian population in 2016, 16.1 percent of the population 15 years of age or older had a bachelor's degree or higher. In that same year, 7.3 percent of First Nations, 10.7 percent of Métis, and 3.9 percent of Inuit people over the age of 15 had a bachelor's degree or higher. Indigenous people with post-secondary education obtain better jobs and incomes. Métis people with a degree higher than a bachelor's earn on average about $74 000; First Nations, about $69 000; and Inuit about $76 000. For the total population of Canada, average income for those with degrees higher than a bachelor's is about $79 000 (Statistics Canada, 2018b).

TIME FOR REVIEW

1. Describe the different groups that make up Canada's Indigenous population.
2. Does the culture of poverty thesis offer a credible explanation of the socioeconomic differences between Indigenous and non-Indigenous peoples in Canada?
3. Is higher education the main pathway out of poverty for Indigenous people?

QUEBEC: NATIONALISM AND IDENTITY

On the evening of October 30, 1995, many adult Canadians were tuned to TV or radio coverage of the Quebec referendum on separation. I followed the results that night with mixed emotions. On the one hand, as a second-generation Canadian with no ethnic roots in the old British Empire, I could

empathize with people in Quebec. On the other hand, as a child of the Pierre Elliot Trudeau years, I was socialized to believe in a vision of Canadian unity. Many on the "no" side believed that a lot of Quebeckers were just bluffing in the pre-referendum rhetoric; when it came to the crunch, they would vote in favour of staying in Canada. Then the results came in. In some parts of Quebec, 90 percent of voters were in favour of separation. As the results from around Montreal were tabulated, the "no" side gained ground. When the final count was tallied, 49.6 percent of Quebeckers voted for separation. Across Canada, people were both exhilarated and downcast because Canada had "won."

Will the issue of separation go away? For the time being, it seems that separation is on the back burner of politics in Quebec. Other ethnicity-related issues related to immigrant integration have taken centre stage. As with other areas of ethnic relations in Canada, an understanding of the contemporary scene must begin with an appreciation of history and of power relations. In this section, I examine three main sociological questions: (1) What is the historical basis for the emergence of Québécois nationalism? (2) Who is a Québécois? (3) What does the close 1995 vote mean for ethnic relations in Quebec and the country? And how do current concerns about immigrant integration fit with Quebec's distinct status in Canadian society?

THE SOCIAL BASIS OF QUÉBÉCOIS NATIONALISM

Even though the 1867 British North America Act asserted that there were two founding peoples of Canada, the English and the French, and that they had equal places in Canadian Confederation, *les Québécois* are one of the oldest colonized peoples in the world (Milner and Milner, 1973). The French government controlled the colony of New France from the early 1600s to 1763. The inhabitants of New France were expected to serve the interests of France. The colony was established in part to pursue the fur trade and to transfer economic resources to the mother country. Much of the French commercial and political elite left the colony following the British victory over France in 1763. When New France was transferred to British control—what the Québécois refer to as "The Conquest"—a new colonizing power came to dominate the society.

An anglophone-unilingual, English-speaking elite gradually took over the economic and political affairs of the province. Most French Canadian peasants (*habitants*) remained subsistence farmers. During the nineteenth century, some of them immigrated to the northeastern United States to work in the expanding cotton and linen mills; others moved to other provinces in Canada; and still others became part of the urban industrial working class in the province (Ramirez, 1991). By the late nineteenth century, Quebec was a province where "capital speaks English and labour speaks French" (Whitaker, 1993: 22)—a telling description of the way in which linguistic and class structures overlapped. The French Canadians in Quebec, who formed a numerical majority, were worse off than the anglophone minority in virtually every material way (Whitaker, 1993: 22).

The Catholic Church occupied a unique position as a social, political, and religious intermediary between the two groups. In addition to attending to the religious needs of its French-speaking parishioners, the Catholic Church acted as an agent of social control over French Canadian workers and farmers. The church promoted ideologies that were conservative and anti-modern. It devalued the importance of formal education for the masses, discouraged workers from forming and joining secular trade unions, encouraged married couples to have large families, and vigorously discouraged French Canadians from taking up professions or establishing businesses of their own. These ideas were not in the best material interests of French Canadian workers and farmers, but they helped ensure the survival of French Canadian culture (Latouche, 1993).

Quebec's social structure began to change quickly during the rapid industrialization stimulated by World War I. The industrial working class became a significant player on the political scene. One of the biggest changes in the 1940s and 1950s was the rise of a new francophone middle class of technical workers and professionals. The upper echelons of the corporate world, still under the control of anglophones, remained hostile to the advancement of francophones, even if they were bilingual. The new francophone middle class, therefore, faced a situation of blocked social mobility, which was partly responsible for the Quiet Revolution in Quebec.

The **Quiet Revolution** was the social, political, and cultural transformation of Quebec in the 1960s,

in part because of the initiatives of this new middle class. These changes included the secularization of the educational system, reform of the civil service, growth in the provincially controlled public sector, greater involvement of the Quebec provincial government in the economic affairs of the province, and questioning of the Catholic Church's authority. Facing blocked mobility in the corporate world, francophones created their own economic opportunities by expanding the power of the provincial government.

Social scientists and political pundits have pored over referendum and federal and provincial election results over the past 40 years in an effort to determine which social forces are responsible for sustaining the push for sovereignty (Mahéo and Belanger, 2018). Some see the present-day sovereignty movement as an expression of middle-class nationalism that is a continuation of the Quiet Revolution. From this perspective, separation is promoted by middle-class professionals as a way of furthering their material interests. Emboldened by the success at expanding the activities of the provincial government during the Quiet Revolution, they desire even more control over their affairs (Whitaker, 1993). Others see support for the Parti Québécois (PQ), the provincial political party that has historically been at the forefront of calls for separation from the rest of Canada, and the broader sovereignty movement, as generationally based: baby boomers (born between 1945 and 1964), and members of Generation X (born between 1965 and 1979) tend to be more favourably inclined to vote for the PQ, but Millennials (born between 1980 and 1994) are less inclined to see sovereignty as a priority (Mahéo and Belanger, 2018).

Augie Fleras argues that, rather than defining support for the sovereignty movement in class or generational terms, it is more useful to conceptualize the movement as made up of groups who have differing views about how best to maintain their language and culture. So the present-day sovereignty movement consists in part of moderates who want to strengthen Quebec's position within the federal system. This involves a new constitutional division of powers that has yet to be settled. Radical supporters, however, argue that the best way for the French language and culture to survive is for the people of Quebec to have their own state. They argue that they will always be a minority if they stay in Canada and that they will always be subject to the tyranny of the majority. As Louise Beaudoin of the Parti Québécois put it, "I want to be a majority in my own country" (Fleras, 2012: 242). Among many Quebeckers of French ancestry, the desire to maintain their majority status does not involve a desire for their own state. Today, it takes the form of concern about who is a "real" Québécois and whether immigrants and other ethnic minorities ought to integrate into their distinct society.

WHO IS QUÉBÉCOIS?

The population of Quebec is ethnically and linguistically heterogeneous, with 20.6 percent of the population made up of people whose mother tongue is not French: anglophones, allophones (people whose mother tongue is neither French nor English), Jews, and Indigenous peoples. Thirteen percent of the population is made up of "visible minorities" (Statistics Canada, 2017d). One of the central issues facing the nationalist movement in Quebec is the definition of a Québécois. This question cuts to the heart of current ethnic relations in the province.

Benedict Anderson (1983) regards nations as "imagined communities." They are imagined in the sense that, even though members of the smallest nation can never know everyone in the community, there is still a common feeling of fellowship with others in the nation. People in Shawinigan do not know all other Quebeckers, but they have a comradeship that extends beyond personal relationships. Nations also possess physical and symbolic boundaries that define who is a member and who

Who is Québécois?

SOURCE: © Margoe Edwards/Shutterstock.

is not. Sociologists interested in nationalism seek to identify the symbolic boundaries of the nation. In the case of the nationalist movement in Quebec, this issue is translated into the question of who is "in" and who is "outside" the imagined community. And if some groups are "out," will they ever be accepted as Québécois?

Most nationalists define the imagined community as all people who now live in the province of Quebec. For them, the social and symbolic boundaries of the nation correspond to present-day provincial boundaries. Sociologists call this a form of **civic nationalism** (Balthazar, 1993).

A minority of nationalists reject civic nationalism in favour of cultural and linguistic criteria for membership in the nation. *Ethnic nationalists* define the Québécois as people who share a common history, culture, ancestry, or language. This is where the concept of *pure laine* ("pure wool") Québécois becomes important. Some nationalists regard the true Québécois as only those who are the direct descendants of the French people who settled in the colony of New France before the conquest of 1763. Other groups in the province are regarded as "cultural communities" (Groupe de recherche ethnicité et societé, 1997: 107). According to the province's policy of interculturalism, these cultural communities must learn to accommodate themselves to the dominant francophone culture and language.

The debate about how to define a nation is not academic hairsplitting. Then-premier Jacques Parizeau commented on referendum night in 1995 that the pro-sovereignty forces were defeated by "money and the ethnic vote." After his resignation, Parizeau commented further that it was the first time in Canadian history that the majority (60 percent) of francophone Quebeckers voted in favour of sovereignty. These statements implied that ethnic minorities were not really part of the nation and that *pure laine* votes should be worth more than the votes of others. At the time, Parizeau's remarks also confirmed the worst fears of ethnic minorities—namely, that sovereigntists are not civic nationalists but rather ethnic nationalists at heart and that ethnic minorities will never be considered full and equal citizens in a sovereign Quebec (Ha, 1995).

Although sovereignty may be off the political table for the moment, the nature of Quebec identity continues to be hotly debated. In 2007, the government of Quebec established the Consultation Commission on Accommodation Practices Related to Cultural Differences to investigate public discontent over the nature of change in Quebec society occurring as a result of immigration and increasing cultural and religious diversity. The "Reasonable Accommodation Commission," as it came to be known, held public forums around the province. Quebeckers from all walks of life participated in these forums. Some embraced the new diversity and called for renewed effort to welcome newcomers and ethno-religious communities. Others expressed anxiety over the future of Quebec's core secular values and the status of the French language and French culture in North America (Bouchard and Taylor, 2008: 37). As Commissioners Gerard Bouchard and Charles Taylor wrote:

> The main danger we are facing is that the groups that make up our society combine their mistrust and (largely unfounded) reciprocal fears and thus jeopardize the *rapprochement* process now under way. In other words, there is a risk that our imaginary fears will engender a genuine danger. We are thinking, in particular, of the still fragile Quebec identity that has taken shape in recent decades and continues to grow despite our differences, or more precisely, from our differences. Moreover, and quite rightly, it is abundantly but freely sustained by the French-Canadian heritage, a very rich heritage that is thus enjoying a new life not by closing in on itself but by opening up the creative, fruitful contribution of the Other. This is precisely what it has done repeatedly in the past. In short, it is the future of the Quebec nation that is at stake here (Bouchard and Taylor, 2008: 242).

Quebeckers, and Canadians more generally, intently followed the work of the Reasonable Accommodation Commission. Since then, identity-based controversies have been a regular feature of Quebec society. In 2014, the governing Parti Québécois pushed for the establishment of a "Charter of Quebec Values," which advocated, among other things, a ban on wearing "conspicuous" religious symbols, such as headscarves, by government employees. The PQ lost the 2014 election, and the proposed Charter was dropped.

The Liberals, who won the election, rekindled concerns about identity and accommodation when they introduced and passed Bill 62, an Act to foster adherence to state religious neutrality and, in particular, to provide a framework for requests for accommodation on religious grounds in certain bodies. The legislation focused largely on Muslim women who wear a niqab or burka, face-covering garments that signify modesty. The legislation said people must have their face uncovered to work in a government job or to access various kinds of government services in hospitals, educational institutions, and even buses. The legislation was challenged in the courts for violating Canada's Charter of Rights and Freedoms, and was stayed by a Quebec Superior Court judge in 2018 (Peritz, 2018).

The Liberals were replaced by the *Coalition Avenir Québec*, which rode to power on a platform that included cutting the number of immigrants admitted to the province, imposing a language and values test on new immigrants, and banning provincial government employees (teachers, police officers, judges, and civil servants) from wearing religious garments (Lum, 2019). As Fleras (2012: 234) puts it, "Quebec must strike a balance between securing its future identity as a francophone and secular-liberal society with remaining a welcoming community for ethno-religious minorities." Although less politicized, the rest of Canada also faces a balancing act between maintaining "Canadian" values and identity and becoming a more hospitable place for newcomers.

TIME FOR REVIEW

1. What was the Quiet Revolution?
2. Is the sovereignty movement in Quebec based on ethnic or civic nationalism?
3. How can Quebeckers strike a balance between (a) protecting their unique French language and culture and (b) creating a welcoming society for immigrants and ethno-religious communities?

IMMIGRATION: STATE FORMATION AND ECONOMIC DEVELOPMENT

The third aspect of ethnic and racial relations in Canada that I consider is immigrant/nonimmigrant relations. In 2016, 7.5 million immigrants were living in Canada, representing 21.9 percent of the population. In large cities, the impact of immigration is even greater. In 2016, immigrants made up 23.4 percent of the population of Montreal, 29.4 percent of the population of Calgary, 40.8 percent of the population of Vancouver, and 46.1 percent of the population of Toronto (Statistics Canada, 2017c). Canada accepts more immigrants and refugees in proportion to our population than any other high-income country in the world apart from Australia and Israel (United Nations, 2017).

Migration has been a feature of our history for more than 300 years. However, the nature, sources, determinants, and consequences of immigration have varied through history. In the nineteenth century, immigrants contributed to capitalist state formation—the process of creating a capitalist system of production and governance. They did this in a number of ways. The early working class in Canada was made up largely of immigrants (Avery, 1995; Pentland, 1981). Immigrant workers helped build the canals, railways, and roads that became part of our economic infrastructure. Many nineteenth-century immigrants were farmers. Their crops were used to feed Canadian workers and, as productivity increased, were exported to feed people in other countries. Farmers helped to stimulate capitalist industry through their roles as consumers of goods. A significant proportion of the corporate elite in nineteenth-century Canada was made up of immigrants (Clement, 1975; Macmillan, 1985), as was a large segment of the early political elite. Canada's first prime minister, Sir John A. Macdonald, was from Glasgow, Scotland.

Immigrants continue to make important contributions to Canadian society. A Conference Board of Canada report notes that there would be dire social and economic consequences if Canada shut its doors to immigration. Economic growth would likely fall from a rate of about 1.9 percent per year to 1.3 percent, Canada's population would age more rapidly, and the size of the labour force would decline. Retiring at the age of 55, or even 65, would become a pipe dream for many older workers, as employers and governments would need to take steps to retain enough workers. Employers would face serious shortages of workers, and manufacturers would face a smaller consumer market in which to sell their goods (El-Assal and Fields, 2018).

FACTORS THAT SHAPE CANADIAN IMMIGRATION

Over the past 100 years, six main variables have influenced which groups of people have been let into the country as immigrants.

The most important factor is the perceived economic value of certain occupational groups. Most immigrants are admitted to Canada because they fill job vacancies, have certain skills that are in demand, or because they create jobs for other Canadians. One of the central objectives of Canadian immigration policy is to contribute to the country's prosperity. As a result, the flow of immigrants to Canada has been closely linked to the structure of the Canadian economy. Between 1947 and the early 1960s, for example, immigrants were regarded by the Canadian government as "factory fodder" (Collins, 1988). Immigrants were recruited to fill unskilled and semiskilled manual jobs in agriculture, construction, mining, logging, the garment industry, and heavy manufacturing. During this time, it was common for individual employers to demand that the government recruit as many as 300 immigrant workers at a time to fill job openings (Avery, 1995).

In the early 1960s, immigration policy began to place more emphasis on the recruitment of highly skilled professional and technical workers, and on immigrants with large amounts of investment capital. Canada still wants highly skilled workers, but it also admits large numbers of unskilled workers for jobs that Canadians do not want to do.

The second determinant of immigration is ethnic and racial **stereotypes**—exaggerated, oversimplified images of the characteristics of social groups. Before 1962, Canadian immigration policy had a racialized hierarchy of desirability. Immigration policy was based on the assumption that European immigrants were racially and culturally superior to other potential immigrants. Non-Europeans were stereotyped as racially and culturally inferior and, therefore, were not welcome. In the 1950s, for example, immigration officials could bar groups from entering Canada on the grounds that the groups were "unsuited to climatic and economic conditions" or that they were "unable to assimilate" (Bolaria and Li, 1988). These phrases were thinly veiled excuses for racial preferences in the selection of immigrants.

Since 1962, ethnic and racial stereotyping in selecting new immigrants has become less important. Canadian immigration policy is now more open in terms of the ethnic and racial origins of immigrants (see Table 8.1). So, until 1962, Europeans made up

TABLE 8.1 Top 10 Source Countries of Canadian Permanent Residents, 1966 and 2017

1966		2017	
COUNTRY	**NUMBER**	**COUNTRY**	**NUMBER**
United Kingdom	63 291	India	51 650
Italy	31 625	Philippines	40 857
United States	17 514	China	30 278
Germany	9 263	Syria	12 044
Portugal	7 930	United States	9 100
France	7 872	Pakistan	7 655
Greece	7 174	France	6 600
Netherlands	3 749	Nigeria	5 459
Australia	3 329	UK	5 293
Switzerland	2 982	Iraq	4 740

SOURCE: Government of Canada. (2019). 2018 Annual Report to Parliament on Immigration. https://www.canada.ca/en/immigration-refugees-citizenship/corporate/publications-manuals/annual-report-parliament-immigration-2018/report.html.

more than 90 percent of immigrants to Canada. Now, immigrants from Europe make up about 13 percent of the yearly intake.

The third variable that shapes immigrant selection consists of a variety of geopolitical considerations stemming from Canada's relationships with other countries. Racist selection criteria were taken out of immigration regulations in the 1960s, in part because they interfered with Canadian international diplomacy. In the early 1960s, Canada began to assert itself as a middle power in world politics that could mediate social conflicts in and between other countries. Outside of Europe, though, our diplomats did not have much credibility because our immigration policy implied that certain groups were inferior and therefore not suited to life in Canada (Hawkins, 1989).

In the 1980s, the Cold War also played a role in shaping who was let in. According to Whitaker (1987), a double standard was at work in the admission of refugees. People who managed to escape from the Soviet Union or other Eastern Bloc countries were routinely granted refugee status in Canada. In 1985, for example, it took a day for the brother of a Czech hockey star who played for the Toronto Maple Leafs to be granted refugee status. Canadian immigration bureaucrats were much more cautious, however, about admitting "socialist" refugees who were fleeing right-wing dictatorships in various Central American countries. More recently, in the context of the U.S.-led war in Iraq, Canada agreed to accept several thousand Iraqi refugees as a way of helping the American government manage tensions in the Middle East.

The fourth variable affecting immigrant selection is humanitarianism. Canada accepts immigrants and refugees partly on humanitarian and compassionate grounds. In 1986, Canada was the first country to be awarded the Nansen Medal by the United Nations for its generosity and commitment to international refugee programs (Fleras, 2012). Canada continues to be one of the top refugee resettlement countries in the world.

The influence of the fifth variable, public opinion, is more difficult to determine, in part because Canadians do not speak with one voice regarding immigration (Wilkes, Guppy, and Farris, 2008). A 2018 survey conducted by The Environics Institute for Survey Research found that 35 percent of Canadians agreed with the statement that "Immigration levels are too high," while 58 percent disagreed. Seventy-six percent agreed that the economic impact of immigration is positive; 18 percent disagreed. Forty-five percent of Canadians said that immigration was making Canada a better place; 17 percent said that immigration was making Canada a worse place, 31 percent said immigration made no difference to the country and 7 percent said "it depends" or did not know. Canadians are equally divided on the question of whether refugee claimants are not legitimate: 40 percent disagreed and 41 percent agreed, while 19 percent said neither, did not know, or did not answer the question (Environics Institute for Survey Research, 2018).

The sixth variable, security considerations, has become more important since the terrorist attacks on the United States on September 11, 2001. In the aftermath of the attacks, Canada introduced a new Permanent Resident Card and a number of new measures to increase security at Canadian borders. In addition, Canada and the United States are increasingly discussing the harmonization of immigration policies, particularly in the area of security screening of immigrants and refugees. Some commentators refer to this harmonization as a move toward a "Fortress North America" (Satzewich and Wong, 2003).

CONTEMPORARY IMMIGRATION CATEGORIES

Immigrants in Canada fit into one of three main categories: refugees, family class, and economic immigrants. Altogether, 286 479 immigrants entered Canada in 2017, and the government plans to increase that number to 340 000 by 2020.

Refugees

Nearly 59 000 refugees and their dependants were admitted to Canada in 2016. There are three categories of refugees that Canada accepts through its immigration program. *Convention refugees* are people who are defined as refugees by the 1951 Geneva Convention Relating to the Status of Refugees and its 1967 protocol. They are people who, by reason of their race, religion, nationality, membership in a particular social group, or political opinion, live outside of their country of nationality or their country of habitual residence and who are unable or unwilling, because of fear of persecution, to return to their country of origin (Citizenship and Immigration Canada, 1996: 28).

Country of asylum class refugees are people who are outside their country of citizenship or residence and are seriously and personally affected by civil war, armed conflict, or massive violations of human rights. Between 2015 and February 2018, Canada admitted nearly 52 000 Syrian refugees under various sponsorship arrangements in the asylum class. Finally, *source country class* refugees include people who would meet the definition of a Convention refugee but who are still in their country of citizenship or residence. This category also includes people who have been detained or imprisoned and are suffering serious deprivations of the right of freedom of expression, the right of dissent, or the right to engage in trade union activity.

Family Class Immigrants

Over 78 000 *family class immigrants* arrived in Canada in 2016. Family class immigrants have close family members already living in Canada who are willing and able to support them. A sponsor must be a Canadian citizen or a permanent resident who is over 18 years of age and who is living in Canada. Depending on the circumstances, a sponsor must be able to provide for the lodging, care, maintenance, and normal settlement needs of the family member(s) for between three and ten years (Citizenship and Immigration Canada, 2002).

Economic Immigrants

Economic immigrants numbered 156 000 in 2016. There are eight subcategories of economic immigrants. Among the most important are *skilled workers*. They must have one year of continuous full-time paid work experience in either a managerial, professional, or technical job or skilled trade, and their eligibility to immigrate to Canada is assessed on the basis of merit as measured by the **points system**.

As Table 8.2 shows, applicants are awarded points for various attributes that the Canadian government deems important in determining an immigrant's economic and settlement prospects. An applicant has to earn a minimum of 67 out of 100 points to "pass" and potentially gain admission to Canada as a skilled worker via the Express Entry System. The amount of money immigrants need to have when they arrive in Canada depends on the number of people in their family. For example, an immigrant who brings three family members to Canada needs to have $23 181.

TABLE 8.2 The Points System for the Selection of Skilled Workers and Professionals, Canada, 2018*

CRITERIA	MAXIMUM POINTS
Proficiency in English and/or French	28 points
Education	25 points
Work experience	15 points
Age	12 points
Arranged employment in Canada	10 points
Adaptability	10 points
Pass Mark	**67 points**

*Note: This information is subject to change. For the most current information, see https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/eligibility/federal-skilled-workers/six-selection-factors-federal-skilled-workers.html.

SOURCE: HER MAJESTY THE QUEEN IN RIGHT OF CANADA (as represented by the Department of Citizenship and Immigration Canada).

Other economic pathways to immigrate to Canada include the *provincial nominees* and the *Canadian experience* classes. Provinces may fast-track individuals for admission to Canada based on job-specific provincial labour shortages. The Canadian experience class allows temporary workers and international students who have studied in Canada to apply for permanent residency. *Live-in caregivers* are admitted as housekeepers and nannies, mainly for upper-middle-class and wealthy families.

TIME FOR REVIEW

1. To what extent did ethnic and racial stereotypes shape Canadian immigration policy? To what degree do they continue to do so today?
2. What are the main features of Canadian immigration policy?
3. What characteristics does the points system emphasize? Why?

(See Critical Sociology: Transnational Ties and Suspect Minorities.)

Critical Sociology TRANSNATIONAL TIES AND SUSPECT MINORITIES

Sociological research demonstrates that the children of immigrants often maintain a strong emotional attachment to their parents' country of origin. Their ethnic identity is "transnational" in the sense that it spans two countries (Somerville, 2008).

Transnational ethnic identity is made possible by the Internet, cellphones, cable TV, and international travel, all of which have become widely affordable. These technologies allow second-generation Canadians to interact almost daily with relatives in their parents' homeland and to gain easy access to its living and breathing language and culture. Such connections influence the ethnic identity of second-generation immigrants and are reflected in their emotional attachments, clothing choice, language use, and even their political involvements.

However, Kalyani Thurairajah's (2015) research on second-generation Tamil Canadians shows that transnational ties, particularly related to politics in an ancestral homeland, can often be regarded with suspicion by other Canadians and the Canadian government. In 2009, several thousand Tamil Canadians took to the streets in Toronto and Ottawa to protest the Sri Lankan government's policies that targeted Tamils in Sri Lanka. Some protesters claimed the Sri Lankan government was engaged in genocide, the systematic destruction of a group of people. The Tamil Tigers, an insurgent group that fought the Sri Lankan government since the 1980s, were declared a terrorist group by the Canadian government in 2006. Some Tamil Canadians supported the Tigers in their fight against the Sri Lankan government. As Thurairajah (2015:173) points out:

> Suddenly Tamil Canadians were faced with the challenge of determining whether their support for [an independent Tamil state and the Tamil Tigers] was a betrayal to their allegiance to Canada, while also struggling to decipher what this act by the Canadian government meant in terms of its loyalties to the diasporic homeland.

Critical Thinking Questions

1. Does Canadian multicultural policy encourage immigrants and their children to maintain ties to their ancestral homelands?
2. Are immigrant transnational ties positive or negative for Canada?
3. Do ties to their country of origin mean that second-generation members of ethnic communities are less Canadian than they should be?

ETHNIC INEQUALITY AND THE CANADIAN LABOUR MARKET

JOHN PORTER AND THE VERTICAL MOSAIC

What happens to immigrants after they come to Canada? How are they sorted and placed in the socio-economic structure? John Porter's answers to these questions in *The Vertical Mosaic* (1965 [2015]) have had a profound impact on Canadian sociology. Since the book's publication, Canadian sociologists have been interested in whether ethnicity and race affect the operation of the labour market, social mobility, and the composition of elites (Jedwab and Satzewich, 2015).

Porter argued that Canada is a **vertical mosaic,** a society in which ethnic groups tend to occupy different and unequal positions in the stratification system. He called the first ethnic group to take control of a previously unoccupied or newly conquered territory the *charter group* of that society. One prerogative that goes to a charter group is the ability to decide "what other groups are to be let in and what they will be permitted to do" (Porter, 1965: 62). Canada has two charter groups, the English and the French. Although their power was, and is, unequal, Porter argued that the two charter groups have been able to set the terms by which other immigrants are admitted to Canada. These charter groups reserved for themselves the top positions in the occupational hierarchy. They also made up the upper ranks of the labour, political, bureaucratic, religious, and media elites.

Immigrants who arrived after these charter groups were assigned to less preferred positions. Non-English and non-French immigrants were assigned an entrance status that was linked in part to the social evaluation of their cultural and racial capacities. Groups from Northern and Western Europe were considered more racially and culturally like the English and French, and were accorded a higher entrance status than Southern and Eastern European immigrants were. The latter were regarded as culturally, if not racially, inferior to the charter groups and were therefore placed in lower

levels of the occupational hierarchy and excluded from elite positions. Non-Europeans were defined as unable to assimilate and were virtually barred from entry (Woodsworth, 1972).

Porter argued that once the vertical mosaic was established, it took on a life of its own. Immigrants and their descendants who were initially allocated a subordinate entrance status faced limited prospects for upward social mobility. He thought two factors accounted for the rigidity of the vertical mosaic. One was blatant prejudice and discrimination by charter groups. The other was the retention by ethnic groups of cultural practices that were incompatible with economic success in modern, industrialized societies. In other words, certain immigrants and their descendants were caught in an ethnic mobility trap because of their continued identification with a subordinated and marginalized ethnic group (Wiley, 1967).

In the context of its time, Porter's analysis was powerful and insightful. As we have seen, before 1962, the selection of new immigrants was based on ethnic and racial stereotypes. These stereotypes also shaped charter group perceptions of what kinds of jobs immigrants were fit to do. In the 1950s, for example, Italian immigrant men were regarded by immigration bureaucrats and members of the economic elite as culturally willing and able to "tolerate irregular employment, low wages and physically demanding work." They were recruited specifically for work in agriculture, mining, domestic service, the metal trades, and logging (Iacovetta, 1992: 28). Black women from the Caribbean were recruited specifically as housekeepers and nannies for middle-class families in the 1950s and 1960s, in part because they were believed to be nurturing and passive (Daenzer, 1993).

THE DECLINING SIGNIFICANCE OF THE VERTICAL MOSAIC

Does the vertical mosaic still exist? Is the distribution of economic rewards still based on ethnicity? Since the 1970s, debates have raged among Canadian sociologists about whether race and ethnicity continue to shape our stratification system (Brym with Fox, 1989). Gordon Darroch (1979) and Edward Herberg (1990) argue that the vertical mosaic is no longer a useful way of describing our society. Later in life, John Porter also had doubts about its relevance (Pineo and Porter, 1985). Other scholars argue that, although we may be moving in the direction of greater equality, the vertical mosaic is still a useful metaphor for describing our society. Some analysts suggest that the vertical mosaic has been recast along racial lines (Fleras, 2012); others argue that immigration status is the key to understanding patterns of inequality within the "new vertical mosaic" (Nakhaie, 2006).

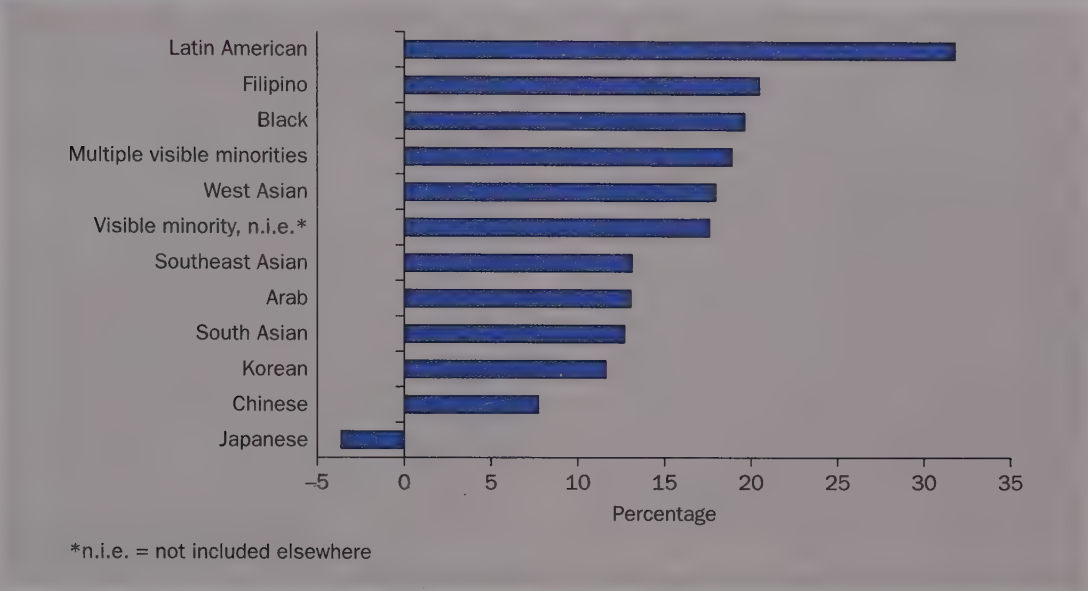
What is the evidence for the view that "race" (visible minority status) and/or immigration status constitute fundamental dividing lines in Canadian society? One way to answer this question is to compare the earnings of visible minorities with the earnings of those who are not visible minorities.

A Conference Board of Canada (2017) report examines the racial wage gap in Canada. The report compares the earnings of university-educated, Canadian-born members of visible minority groups with university-educated, Canadian-born white people. It defines the racial wage gap as the percentage difference in full-year, full-time median wages and salaries between university-educated, Canadian-born visible minorities and whites. The report shows that, on average, members of visible minority groups earned about 12.6 percent less than their white peers in 2010. In 2010, university-educated white people earned on average $70 196, while their visible minority counterparts earned only $61 381 on average.

The extent of the racial wage gap varies by province of residence, gender, and specific visible minority group. For example, visible minority groups in Ontario earned about 17. 2 percent less than did white people, while in Quebec they earned 19.7 percent less. At about 13.5 percent, the wage gap was slightly less dramatic in the Prairie provinces. In Prince Edward Island and New Brunswick, visible minority groups had an 8.1 percent and 12.9 percent income advantage over whites, respectively. When gender is factored in, the picture remains much the same, with visible minority men and women consistently earning less than their white counterparts in most provinces, with the exception of Atlantic Canada.

When specific visible minority groups are considered, we can see even greater variation. For example, Figure 8.4 shows that Canadian-born individuals of Japanese ancestry earned about 3.7 percent more than whites did in 2010. At the other end of the spectrum, Canadian-born individuals of Latin American ancestry earned 31.7 percent less than their white peers. People of Filipino and black ancestry earned about 80 cents for every dollar earned by white workers, while Southeast Asian, Arab, and South Asian Canadian-born individuals earned about 87 cents for every dollar earned by a white Canadian-born person.

FIGURE 8.4 Racial Wage Gap, Canada, 2010



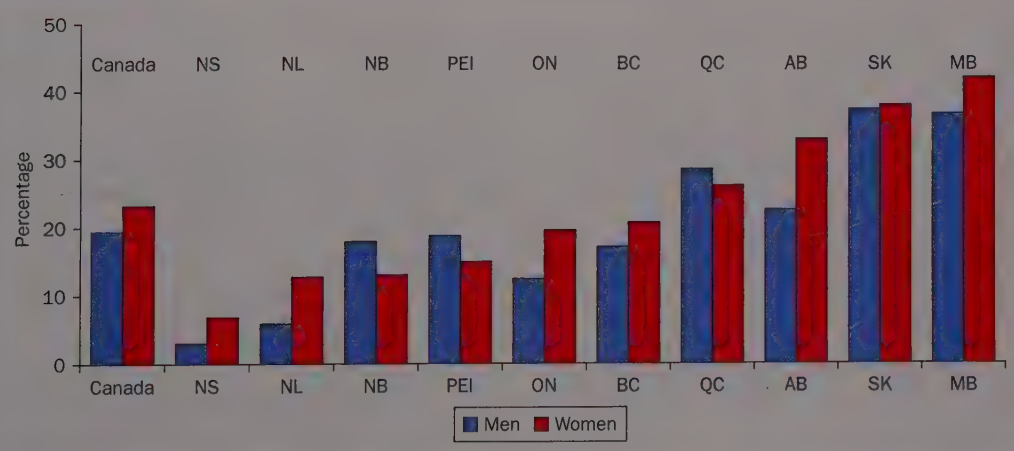
SOURCE: Conference Board of Canada, *Racial Wage Gap*, 2017, https://www.conferenceboard.ca/hcp/provincial/society/racial-gap.aspx.

Canadian-born people of Chinese ancestry earned about 8 percent less than white workers did.

The wage gap is even more dramatic when we look at differences in median hourly earnings between university-educated immigrants and those born in Canada. The wage gap in Canada as a whole is about 20 percent. In 2014, while median income for Canadian-born university-educated people was $32 790, it was $6 738 less for university-educated immigrants. Figure 8.5 provides detailed information on the immigrant wage gap for men and women. The immigrant wage gap for university-educated immigrant men and women is highest in Manitoba and Saskatchewan and varies across all provinces between 36 percent and 42 percent. As with the racial wage gap, the immigrant wage gap is lowest in the Atlantic provinces.

The vertical mosaic metaphor seems to describe accurately the position of many visible minorities and immigrants, who are struggling with higher rates of poverty and unemployment, and lower earnings, than their white immigrant counterparts and

FIGURE 8.5 Immigrant Wage Gap Higher for Women in Most Provinces, 2015



SOURCE: Conference Board of Canada, *Immigrant Wage Gap*, 2017, at https://www.conferenceboard.ca/hcp/provincial/society/immigrant-gap.aspx.

Canadian-born members of visible minority groups (Fleras, 2012: 139–44).

Some sociologists have explained overall earnings differences between immigrants and the Canadian-born by examining immigrant credentials. They suggest that the education credentials of immigrants, many of whom are also visible minorities, are often devalued by the labour market and certification authorities. In one celebrated case, an evaluation officer of the Ontario Ministry of Education wrote to a Jamaican immigrant that his honours degree from Harvard University and his PhD from Stanford were equivalent to "at least Grade Thirteen in the Ontario school system" (Special Committee, 1984). Although this case may have been a bureaucratic error, evidence shows that many immigrant teachers, doctors, nurses, and engineers find that their non-Western university degrees and diplomas are of little value in Canada. Some analysts say that the devaluation of credentials is a reflection of racism in Canadian society. Others emphasize the lack of adequate certification authorities in the country. Both groups hope that, as immigrants spend more time in the country, their economic success will increase (Basran and Zong, 1998; Henry and Tator, 2006; Reitz, 2011).

Other research on hiring practices documents the influence of racial discrimination. Henry and Ginsberg (1985) sent two groups of actors with virtually identical résumés to apply for various jobs. The only difference between the members of the two groups was the colour of their skin or their accent: One group consisted of actors who were white and who had Anglo-Canadian accents, and the other group consisted of visible minority group members, some of whom had non-Anglo-Canadian accents. The researchers found that, in both face-to-face interviews and approaches over the telephone, whites received three job offers for every job offered to applicants from visible minority groups. Applicants from visible minority groups were five times as likely to be told that the job had been filled when a subsequent white applicant was invited for an interview (Henry and Ginsberg, 1985).

A follow-up study showed no racial discrimination in job offers following face-to-face contacts between applicants and employers. Blacks and whites received equal numbers of job offers. When it came to approaches over the telephone, however, callers with foreign accents were less likely to be invited for an interview and more likely to be told that the job was filled when, in fact, it was not (Henry, 1989). A more recent study suggests that having an "ethnic-sounding" name affects the hunt for jobs. Employers in Toronto, Montreal, and Vancouver are about 40 percent more likely to interview applicants for jobs with English-sounding names than someone with a "foreign-sounding" name, even when they have the same credentials (Immen, 2011: B12; Oreopoulos and Dechief, 2011).

TIME FOR REVIEW

1. What is the difference between John Porter's concepts of "charter group" status and "entrance group" status?
2. Are some immigrant groups in Canada today caught in an "ethnic mobility trap"?
3. Does discrimination by mainstream society or the different cultures and values that immigrants bring with them explain why some groups do better economically in Canadian society than others do?

SUMMARY

1. **What is racism?**
   Racism involves ideas and practices that discriminate against members of groups that are perceived as racially distinct. *Institutional racism* refers to circumstances in which social institutions operate, intentionally or otherwise, based on racist ideas.

2. **What are the main sociological perspectives that explain patterns of race and ethnic relations?**
   Social-psychological theories focus on how prejudice—an unfavourable, generalized, and rigid belief that is applied to all members of a group—and racism satisfy the psychic needs of certain people. Primordialism argues that ethnic and racial attachments reflect an innate tendency for people to seek out, and associate with, others who are similar in terms of language, culture, beliefs, ancestry, and appearance. Normative theories concentrate on the way in which prejudices are transmitted through socialization and the social circumstances that encourage discriminatory behaviour. Power-conflict theories explain how prejudicial ideas, attitudes, and practices arise in the first place due to power differences between groups.

3. **Who makes up Canada's Indigenous population?**
The term "Indigenous peoples" includes people who are defined by the Constitution as "Indian," "Métis," and "Inuit." The terms used to describe Indigenous peoples are socially negotiated; they change because of shifts in power relations among groups.

4. **What are the sociological perspectives used to explain socioeconomic inequalities between Indigenous and non-Indigenous Canadians?**
The culture of poverty thesis explains the disadvantaged socioeconomic conditions of Indigenous people as the product of their values. Because sociologists came to recognize that values were typically a product of socioeconomic conditions rather than vice versa, they developed the internal colonial theory, which is a variant of conflict theory. Increasingly, conflict and feminist sociologists are interested in class and gender diversity within the Indigenous population.

5. **What is the difference between civic and ethnic nationalism and how is this distinction relevant to understanding contemporary Quebec?**
Economic inequalities between French and English in Quebec formed the historical basis for the emergence of Quebec nationalism. Since the mid-1960s, tension has developed between nationalists who imagine Quebec as a homogeneous ethnic community (ethnic nationalists) and nationalists who include everyone living in Quebec, regardless of ethnicity or language, as a member of the Québécois nation (civic nationalists).

6. **What are the main social forces that have shaped Canadian immigration policy?**
Immigrants contributed significantly to the formation of Canada and continue to do so. Sociologists have identified six main factors that have shaped immigrant selection in Canada: the perceived economic value of certain occupational groups of immigrants, the application of ethnic and racial stereotypes, geopolitical considerations, humanitarianism, public opinion, and security considerations. Most sociologists agree that ethnic and racial stereotypes now play less of a role in shaping immigration policy than they did before the early 1960s.

7. **What did John Porter mean when he argued that Canada was a vertical mosaic?**
John Porter described Canada as a social structure in which ethnic groups occupy different positions within the stratification system. Evidence suggests that the vertical mosaic is declining in importance, at least for European immigrants and people born in Canada. However, many sociologists argue that it has been replaced by a vertical mosaic based on race.

QUESTIONS TO CONSIDER

1. To what extent do racist attitudes and behaviour affect the life-chances of different groups of Canadians?
2. What obligations, if any, do societies have to accommodate themselves to ethno-religious diversity?
3. Do you think that the importance of class and gender diversity within Indigenous communities will increase or decrease in the future? Why?

GLOSSARY

Civic nationalism (p. 188) is a form of nationalism in which the social boundaries of the nation are defined in territorial and geographic terms.

The **culture of poverty thesis** (p. 183) holds that some ethnic groups do not readily assimilate and hence are poor because their cultures do not value economic success, hard work, and achievement.

Discrimination (p. 179) refers to practices that deny members of particular groups equal access to societal rewards.

Institutional racism (p. 177) refers to discriminatory racial practices built into the political, economic, and education systems.

New racism (p. 176) is a theory that suggests that it is natural for groups to form bounded communities. One group is neither better nor worse than another, but feelings of antagonism will arise if outsiders are admitted into a group.

Normative theories of ethnic and racial prejudice (p. 179) focus on the way in which prejudices are transmitted through socialization and the social circumstances that encourage discriminatory behaviour.

The **points system** (p. 192) is used by the Canadian government to select independent immigrants. Applicants are awarded points for various attributes that the Canadian government deems important in determining an immigrant's potential economic contribution to Canada.

Populist political parties (p.180) express opposition to "elites" and appeal to the "common people" rather than to members of specific social classes.

Power-conflict theories of ethnic and racial prejudice (p. 179) explain how prejudicial ideas, attitudes, and practices originate.

Prejudice (p. 178) is an unfavourable, generalized, and rigid belief applied to all members of a group.

Primordialist theory (p. 179) argues that ethnic attachments reflect a basic tendency of people to seek out, and associate with, their "own kind."

The **Quiet Revolution** (p. 186) refers to the social, political, and cultural modernization of Quebec in the 1960s, in part because of the emergence of a large francophone middle class.

Race (p. 175) is a socially constructed label that has been used to describe certain physical differences between people.

Social-psychological theories of race and ethnic relations (p. 178) focus on how prejudice and racism satisfy the psychic needs of certain people.

Stereotypes (p. 190) are exaggerated, oversimplified images of the characteristics of social categories.

The **vertical mosaic** (p. 193) is a social structure in which ethnic groups occupy different and unequal positions in the stratification system.

CHAPTER 9

DEVELOPMENT, UNDERDEVELOPMENT, AND GLOBALIZATION

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Identify different meanings of development and underdevelopment.
- Appreciate that global inequalities are staggering and are wider than once believed.
- Compare and contrast different explanations for why countries are more or less developed.
- List the factors that have allowed the rapid development of a few formerly poor countries and the reasons why such development is typically accompanied by steep social and environmental costs.
- Explain how military aggression, often sponsored by developed countries, has negatively influenced development in many poor countries.

COMMONSENSE THEORIES OF DEVELOPMENT

Many people entertain pet theories or working hypotheses about why some parts of the world are poor and others rich. A personal example may help illustrate this point. My parents lived for several years in countries that were poor by Canadian standards, and my mother held a theory that was popular at the time. She told me about living in a small South American jungle mining camp in what was then the colony of British Guiana and commented that "if you had lived in that heat and humidity you would know why they are so poor." It was perhaps not surprising that a young woman who had lived through 20 Saskatchewan winters would find the tropics an obstacle to productive activity. It was just common sense to her that the climate explained why British Guiana was underdeveloped.

Decades later, my experiences and observations in Mexico and Central America challenged my mother's views. I confronted the architectural evidence of a wealthy colonial past and the archaeological wealth of complex indigenous civilizations that predated the invasion of Europeans. Excavations in Mexico City had just unearthed evidence of the rich city–state of Tenotitchlán that existed when Hernán Cortés and his Spanish soldier adventurers arrived on horseback from the Atlantic Coast in 1519. Just to the north lay the pyramids of Teotihuacán, structures that dwarf the fabled pyramids of Egypt. This city–state reached its peak between 500 and 600 CE, encompassed 21 square kilometres, and had a population 10 times larger than that of contemporary London (Waldman, 2005).

To the south, I encountered the imposing ancient hilltop city of Monte Alban near present-day Oaxaca City and evidence of several other precolonial settlements of considerable size and development along the highway leading farther south into the mountains of the mist-shrouded Lacandon Jungle in the Mexican state of Chiapas that borders Guatemala. In the lowland regions of this zone, I came across some of the most impressive archaeological finds in the western hemisphere, relics of the extensive Mayan civilizations that existed from approximately 50 BCE to 1000 CE. Over time, the Mayans constructed a series of cities that boasted ornate architecture, elaborate irrigation infrastructure and palatial structures for their nobility, and massive platforms to accommodate elaborate religious rituals.

Between 600 and 800 CE, this civilization reached the highest development of its arts and sciences. By then, the Mayans had invented an elaborate system of hieroglyphic writing, a complex calendar for predicting the seasons, accurate computations of time, and detailed astronomical observations. All of this 1500 years ago in a part of the world notable for its heat and humidity. So much for my mother's climate theory of development.

Climate is not completely insignificant in understanding the origins and development of human civilizations. Regions with year-round permafrost or great deserts do not allow dense human settlement and the agriculture it depends on, let alone the accumulation of wealth. Or at least they did not in the past. Today, as the example of the desert kingdom of Dubai shows, oil wealth can help spur impressive development in formerly inhospitable places. The key word here is *can*; other oil-rich countries, such as Nigeria, have failed to mobilize their wealth to realize development goals. They remain mired in poverty. Why? With this question we enter ongoing debates that animate the study of development and explanations for global inequalities that flow from these debates. One of the goals of this chapter is to introduce you to key explanations or theories of development and the controversies they have engendered.

But why study development at all, you might ask? What relevance does it have for my life? What *is* development anyway? It makes sense to address these questions before we examine key debates in the field.

WHAT IS DEVELOPMENT?

The idea of development dates from the eighteenth century, when scholars in Scotland and France formulated the idea of progress. They promoted the industrialization and democratization of society based on the equal rights and freedoms of its citizens.

At first, development was just an idea. It was not until after World War II that the idea crystallized into a full-blown project or, more accurately, a series of projects that became part of state policy and the policy of some non-state organizations (Parpart and Veltmeyer, 2003). After World War II, development came increasingly to mean a process that generated economic growth, industrialization, and modernization in regions and countries perceived to be poor, traditional, and undeveloped. More recently, development has had a broader, more complex meaning, incorporating such notions as progress for women,

empowerment of the underprivileged, and environmental sustainability.

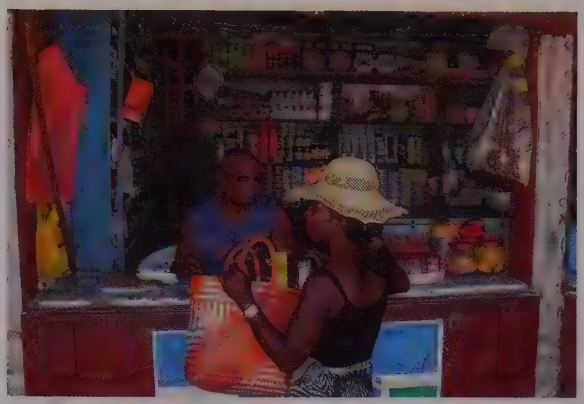
Two main factors motivated interest in development after World War II. First, the Cold War broke out between the developed capitalist countries led by the United States and the communist countries led by the Soviet Union. Among other things, the Cold War involved intense competition between the two rival blocs to amass power by gaining influence and control over less developed countries. Second, businesses in the developed West, particularly the United States, were interested in new markets outside their traditional spheres of operation. Latin America, Africa, and Asia were thus of great interest to the Western powers for geopolitical and economic reasons.

Given the context just described, it may not surprise you to learn that some analysts have argued that development, and the study of development, have served to support world **capitalism**, an economic system based on competitive enterprises seeking to maximize profits by using wage labour. However, as we will see, other analysts deny that that genuine development can occur within the confines of capitalism. They have promoted a non-capitalist road to development.

THE RELEVANCE OF DEVELOPMENT AND GLOBAL INEQUALITIES: SOCIAL JUSTICE AND SECURITY

Earlier I asked why you should care about development. We can look at this question from two perspectives, one involving morality and social justice, the other involving self-interest and the need for security.

Development is an important issue for many people because they find it morally repugnant that an average of 39 percent of people living in 29 countries, more than a billion people, live on US$1.25 a day or less. Madagascar leads the list at 88 percent. Twenty of the 29 countries are in sub-Saharan Africa (World Bank, 2015). They consider it a matter of social justice that the world's desperately poor be lifted out of a life of illiteracy, disease, and hopelessness. They regard it as unacceptable that a Canadian student buys a coffee at Starbucks for three times the average daily wage of more than a billion people, or spends more on a laptop computer than the per capita gross domestic product of the world's 51 poorest countries—less than US$1000 (Milanovic, 2009; United Nations, 2009).



Eighty-eight percent of people in Madagascar live on US$1.25 or less per day.

SOURCE: © Pierre-Yves Babelon/Shutterstock.

(**Gross domestic product** (GDP) is the dollar value of all goods and services produced in a country in a year. "Per capita" gross domestic product is gross domestic product divided by the number of people living in the country. It is one measure of a country's wealth per person.)

Other people are more concerned with the practical implications of having so many people in the world with so little to sustain them. Few of us would feel comfortable living in a luxurious house with expensive furnishings and two luxury cars in the driveway if several of our immediate neighbours lived in a one-room shanty with a tin roof, owned virtually nothing, lacked regular employment, and spent much of their time staring enviously at our lifestyle and property.

Eventually, our neighbours' poverty would have unpleasant implications for us. The higher levels of violence and unrest that accompany poverty would likely wash over to our side of the street. We would have to pay higher taxes to bolster police forces to maintain order and deal with those who decide that it's not fair for us alone to have all the nice things in life. We would soon come to realize that our personal security cannot be divorced from the living conditions of our neighbours, and our failure to help raise their living standard must inevitably have serious, negative implications for us.

Life today is like the scenario painted above, but with added complications. Our poor neighbours might, for example, be living on land we own or land we took from them by using property laws to our advantage and the fact that our neighbours didn't have formal title to the land they had been living on for generations. We might allow our poor

neighbours to grow crops, but they would have to give us most of their harvest for the privilege of living on our land. We might select a few of the poor neighbours to supervise the land and reward them with a disproportionate amount of the crop and some extra money under the table. We might also provide the chosen few with firearms and training so they could protect the property and especially the production of fruits and vegetables, dealing appropriately with anyone who might want to challenge existing property rights.

Challenges would likely arise because most households enjoy only a bare subsistence and grow rapidly, making less food per person available over time. Unrest would mount. We would therefore be forced to send some of our family members to help our managers keep order, and some of them would come back with injuries from the skirmishes. Before long, it would be necessary to lock up and occasionally kill people in the poorer households to maintain the status quo, and some of our own family members would undoubtedly get killed trying to police the growing violence.

When we add these complications to our fictitious neighbourhood economy, we have a model that better mirrors the world as it has existed for some time. It is a model that not only describes huge differences in income between our neighbours and us but also points out the inequality that exists *within* poor neighbourhoods. Importantly, the model also establishes that the neighbourhood economy is maintained by a system of power relations backed up by disproportionate wealth and, ultimately, our willingness to exercise violence when all else fails.

Social scientists who study development have proposed radically different theories to explain development and lack of development. It is now time to outline some of the most important of them. I begin with a brief discussion of approaches that dominated the social sciences in the 1960s.

EARLY THEORIES OF DEVELOPMENT

DEVELOPMENT IN STAGES

The social sciences emerged in the nineteenth century in the context of lively debate in the biological sciences around theories of evolution propounded by Charles Darwin and others. Debates in the natural sciences, especially concerning evolution, deeply influenced social thinkers. Human societies were like biological organisms, they reasoned. Just as animals and plants pass through stages of development, so do societies; and like animals and plants, societies are susceptible to pathologies or diseases.

Such ideas were still influential in the 1960s, when W. W. Rostow argued that societal development follows several necessary **stages of development** (Rostow, 1960). According to Rostow, in the beginning, a society might be traditional, undifferentiated, and undeveloped. When it comes into contact with a developed society, however, science and technology spread, and the traditional society enters a stage of possible "takeoff." Takeoff occurs when and if an increase in market-transactions, manufacturing, and trade takes place. The faster society moves along the path to development, the more quickly barriers to the spread of market relations are removed and the more efficiently scientific and technological diffusion occurs.

DEVELOPMENT AS A STATE OF MIND

Another popular approach in the 1960s was **modernization theory**, which emphasizes the importance of values and norms as drivers of development. David McClelland (1961), for example, argued for the importance of entrepreneurship and what he called the "need for achievement," the desire for feelings of accomplishment and personal satisfaction. People who enjoy a high need for achievement are more likely to become successful entrepreneurs, McClelland argued, and societies that encourage entrepreneurial behaviour and competitiveness are the most likely to develop economically and socially.

Other writers in this tradition emphasized the importance of other values in the development process—the need for savings, investment, innovation, education, high achievement, self-control in having children, and so on. Still others recognized that poor societies also lack capital, stable governments, and modern business techniques (Inkeles and Smith, 1976). But what all modernization theories had in common was their assumption that most of the responsibility for economic backwardness lies with the societies of the "Third World" or "Global South" themselves. According to modernization theorists, development happens when the citizens of the poor countries adopt the virtues of the developed North. If they fail to do so, they remain in a pathological, undeveloped state.

DEVELOPMENT AS DEPENDENCY

Dependency theory sharply challenged the notion that lack of development is due to the deficiencies of less developed countries. It did so by taking a holistic view—recognizing that each part of the world is shaped by, and helps to shape, a wider, global reality—and attending to the history and structure of relations between countries.

Dependency theorists produced abundant evidence of strong and enduring economic and social relationships between "metropolitan powers," such as Spain, Portugal, Britain, and France, and "satellite regions" of the Global South. First focusing on Latin America and the Caribbean (Cardoso and Faletto, 1979; Frank, 1966), they established that it was precisely the nature of the relationship between metropolitan powers and satellite regions that blocked economic progress in the Global South. Let us consider the implications of this argument in detail.

FROM CONTACT TO COLONIALISM

Evidence contradicts the notion that the societies of the Global South existed in an undeveloped state, as stage and modernization theories suggest. From China through the Middle East and the Mediterranean to Central and South America, great civilizations rose and fell. For example, between 1200 and 200 BCE, Carthage flourished on the northern shores of Africa, while the later naval, military, commercial, and cultural advances of the Muslim people of the Maghreb region of northwestern Africa allowed them to invade and dominate Spain and Portugal until the fifteenth century. In the area of east Africa now known as Zimbabwe, we find great stone constructions and evidence of extensive metallurgical development and trade across vast distances. Africans had developed a great deal on their own before Europe began asserting its dominance over the continent (Rodney, 1972).

Initial contact between Europe and the societies of the Global South took place around 1500 and inaugurated the era of European colonialism. For the next several hundred years, the Europeans engaged in wholesale pillage and plunder, causing massive death, migration, and economic upheaval—unpleasant facts that stage and modernization theories ignore. Before Europeans could exploit the Global South for its riches, they had to conquer existing civilizations. Superior technology in the form of gunpowder and firearms helped to secure the conquest, as did diseases borne by the Europeans. Europeans had evolved resistance to smallpox, influenza, and other diseases that they introduced into the Global South. In Mexico alone, the population was reduced from 20 million to 2 million in the first century of contact with Europe. A population collapse of similar magnitude occurred in North America and among the Inca of Peru. Overall, some 95 percent of the New World's population was wiped out in a fairly short period after European contact (Daschuk, 2013; Diamond, 1999: 210–11).

Following their conquest of the New World, the Spanish established a feudalistic landholding system based on hierarchical relationships imported from Europe and subordinated to the power of the Spanish Crown. Its purpose was to support the local European landed elite and funnel valuable minerals, principally gold and silver, and agricultural commodities to the mother country. The Spanish monarchy appropriated much of the profit.

THE SLAVE TRADE

Another disruptive aspect of the relationship between Europe and the Global South involved the West African slave trade. It undermined traditional state structures and forms of governance in West Africa and created deep-seated ethnic animosities.

Forced labour had existed for centuries in Europe. Muslim pirates from North Africa had undertaken raids as far afield as southern England to enslave people. However, the trans-Atlantic slave trade, initiated by Europeans after 1500, established slave economies of unprecedented size, with dire consequences for West Africa in particular.

The Portuguese initiated the trans-Atlantic slave trade near the mouth of the Congo River around 1500. Taking advantage of the custom of local African chiefs to buy household slaves, the Portuguese began trading European merchandise for human lives and shipping enslaved Africans across the Atlantic to work in the vibrant Portuguese colony of Brazil, where they produced first sugar, then coffee. By 1530, five thousand slaves a year were being removed from their homelands for shipment to Brazil (Hochschild, 1999: 12).

Slavery soon became a major disruptive force in West Africa. The ruler of the Kingdom of the Congo, Nzinga Mbemba Afonso, a convert to Christianity who learned Portuguese, wrote to the King of Portugal to protest what was happening to his people:

> Each day the traders are capturing our people—children of this country, sons of

African slaves taken on board *HMS Daphne*, November 1, 1868.
SOURCE: The National Archives of the UK, ref. 84/1310.

> our nobles and vassals, even people of our own family. . . . Corruption and depravity are so widespread that our land is entirely depopulated. . . . We need in this kingdom only priests and schoolteachers, and no merchandise, unless it is wine and flour for Mass. . . . It is our wish that this kingdom not be a place for the trade or transport of slaves (quoted in Hochschild, 1999: 13).

The King of Portugal was unmoved. Slave trading accelerated, and before long, Dutch merchant traders began introducing slavery to the English Caribbean, initially on the island of Barbados. Later, the English established a major Caribbean sugar colony in Jamaica and the Spanish followed suit in Cuba. Later still, American rice and cotton plantations stimulated demand for still more slave labour. By the early nineteenth century, some 12 million Africans and their descendants worked on the plantations of the Caribbean and the United States.

The societies of entire regions of Africa were thus ruined, and the foundation was set for the deep, enduring impoverishment of Africa. Matters worsened when, in the nineteenth century, England, Belgium, France, and Germany carved up much of Africa for its resource wealth. They established artificial boundaries that ignored traditional ethnic spheres of influence, thereby increasing ethnic antagonism and warfare. In some areas, such as the territory that the British named Rhodesia, the colonizers imposed heavy taxes on peasant farmers, forcing them off the best agricultural lands and into wage labour for white farmers (Arrighi, 1970). Later, some dispossessed Africans began a mass migration to South Africa for work in the expanding gold and diamond mines.

Meanwhile, across the Atlantic, the slave economies of the Caribbean and the United States flourished, generating unheard of wealth for slave traders, slave owners, and the European aristocracy and royalty. Slavery enabled capital to accumulate—capital that industrialists would later use to spur European development.

THE STRUCTURAL ROOTS OF UNDERDEVELOPMENT

Dependency theory shows how social and economic structures established by European colonizing powers since about 1500 distorted local societies for the benefit of European traders and merchants, and later blocked the emergence of industrial capitalism in the Global South. In the words of Andre Gundar Frank, a leading dependency theorist, "The historical development of the capitalist system generated **underdevelopment** in the peripheral satellites" (Frank, 1966: 3). At the same time, the extraction of resources from the Global South propelled the rapid development of industry in Western Europe and, later, North America. What remains unclear is whether European *countries* or *classes* were responsible for underdevelopment in the Global South.

COUNTRIES VS. CLASSES AS CAUSES OF UNDERDEVELOPMENT

During the 1970s, debates on development and underdevelopment focused on the mechanisms through which metropolitan powers exploited the Global South. Originally, dependency theorists conceived of underdevelopment as a process involving one area—Western Europe—extracting surplus from other areas—Latin America, Africa, and Asia. Some scholars argued that, in recent times, it was primarily through unfavourable **terms of trade** that exploitation took place. They held that prices of agricultural exports primarily from the underdeveloped south declined

Slave labour on a Caribbean sugar plantation in the 1830s
SOURCE: © British Library Board/Robana/Art Resource, NY.

over time relative to prices of industrial goods made in the developed countries and imported by the poor countries. However, they still imagined that one *area* was exploiting another.

Robert Brenner (1977) challenged the geographical version of dependency theory and revived interest in a Marxist approach that emphasized class relationships. In his view, by analyzing the nature of the class interests that shape underdevelopment and the types of class conflict that underdevelopment engenders, we can gain a fuller and more precise understanding of the process of underdevelopment.

Following Marx, Brenner argued that the struggle among classes to achieve dominance is the prime mover of social change. Accordingly, identifiable classes in the metropolitan countries—merchants, traders, shippers, and the aristocracies and monarchies of Spain, Portugal, Holland, Belgium, France, and England—orchestrated the plunder of the Global South. Moreover, these social actors counted on elites in the Global South to establish mechanisms for extracting valuable commodities by using the forced labour of Indigenous peoples and imported slaves. Brenner further argued that, in more recent times, the mechanisms of underdevelopment changed as England and then the rest of Western Europe began to industrialize under the direction of a new class of industrial capitalists. As industrialization occurred, so too did the nature of demands on the Global South (for example, see Critical Sociology: The Destruction of Third World Dominance in Manufacturing).

NOT ALL COUNTRIES ARE ALIKE: CLASS ALLIANCES AND STATE CONTROL

The Global South is not homogeneous. Each country has a unique history. In particular, different class alliances came to control the states of the Global South, with widely different consequences for the pattern of underdevelopment that ensued (Cardoso and Faletto, 1979). For example, in Argentina and Brazil, the large export-oriented economy that developed under the control of foreign capitalists allowed local elites and a sizable middle and industrial working class to emerge by the late nineteenth century (Murmis and Portantiero, 1969). Especially in periods when foreign influence was weakest (during global recessions, for instance), internal elites and their allies were able to establish local industrial enterprises and internal

Critical Sociology

THE DESTRUCTION OF THIRD WORLD DOMINANCE IN MANUFACTURING

Before the Industrial Revolution began in England in the late eighteenth century, many goods other than foodstuffs were produced in both Europe and the Global South by traditional industry. Small workshops produced a huge variety of metal goods and wooden implements, and all manner of luxury goods made from glass, silver, gold, and so on. Grain was ground in stone grinding mills powered by water or animals. People wove textiles at home on looms from yarn or thread spun on hand-operated spinning wheels. While productivity was low, many people worked in these ways, so output was considerable. Paul Bairoch (1982) estimates that in 1830, the Global South (including Japan) accounted for 63 percent of world manufacturing, compared with just 37 percent for Europe and North America. Levels of productivity differed little by region. This would soon change, however.

In England, the rising influence of modern industrialists challenged the longstanding dominance of old merchant families whose fortunes relied on trade. By the early nineteenth century, industrialists sought to extend markets for their products beyond England, inaugurating the globalization of trade in English-manufactured goods. The old "mercantilist" system relied on protected markets and trade monopolies within them. For example, the British East India Company was allowed to block the import of European-manufactured goods into India, which was good for traders but bad for industrialists. In 1813, however, the monopoly of the British East India Company was ended by the British Parliament. Now, Birmingham textile manufacturers could export cheap textiles produced by modern machinery and the new factory system to India. This development devastated millions of Indian domestic textile producers. Similar events took place elsewhere.

The English factory system integral to industrial capitalism, together with actions by the British government to tear down obstacles to trade in English industrial goods, dramatically reorganized the distribution of industry globally. As Bairoch argued, it was "in the years 1830 to 1860 that this division between the future developed world and the Third World . . . began to take shape. The industrialization of the former led to the **deindustrialization** of the latter, and the proportional contribution of each region to the total [world] output of manufacturing production was almost exactly reversed" (Bairoch, 1982: 274).

Even relatively wealthy countries are not immune to the distortions of capitalist development. For example, the Maritime provinces were the first locus of industrial development in Canada, with a thriving shipbuilding and steel industry (Alexander, 1978). By the 1890s, the proportion of people employed in manufacturing was about the same in Nova Scotia, New Brunswick, and Ontario (Winson, 1985: Table 1).

Despite this promising early start, and in some ways reminiscent of the impact of British manufacturers on Third World industry described by Bairoch, Maritime industries were disadvantaged by federal policies and the actions of central Canadian financial institutions that control Canadian industry. Maritime industry went into decline, negatively affecting the regional farming economy and resulting in a long-term legacy of high unemployment, underemployment, and lower average income for the Maritime population (Acheson, 1972; Winson, 1985).

Critical Thinking Questions

1. History tells us that manufacturing was not always predominantly located in what are today the rich countries. What do you think ultimately prevented India from protecting its own manufacturing industry from being destroyed by Britain's lower-cost manufactured goods?
2. The history of manufacturing in Canada's Maritime provinces also provides a valuable lesson regarding the notion that the dominance of industry in a given region or country is simply a "natural" evolution of the economy. Discuss.

markets that deepened the process of development and strengthened local economies. In contrast, foreign capital was so dominant in small countries, such as Honduras, Costa Rica, and Guatemala, that middle and industrial working classes of much political significance failed to develop, and the economy was based almost exclusively on the exports of just a few commodities, principally bananas and coffee (Ellis, 1983; Handy, 1985; Stone, 1975; Winson, 1983, 1989).

BEYOND DEPENDENCY: AGRARIAN CLASS STRUCTURE AND UNDERDEVELOPMENT

In the 1980s and 1990s, researchers focused increasingly on the role of class structures, class alliances, and state policies to better understand the processes of development and underdevelopment. Consider, for example, research on estates—large, privately owned

agricultural enterprises employing many agricultural workers to produce export crops, such as coffee, wheat, and cotton, in societies as diverse as Chile, Brazil, and Egypt. Analysts found that, for three reasons, estate agriculture was more of an impediment to development than were agrarian structures dominated by small family farms (the North American model in the nineteenth and early twentieth centuries). First, estate owners tended to compensate their workers with small plots of land rather than substantial money wages. This greatly restricted the purchasing power of rural workers and therefore the demand for goods that small manufacturers could have produced locally.

Second, with a ready supply of cheap labour at hand, estate owners had little incentive to employ advanced agricultural machinery on their estates. This limited the local market for manufacturers of agricultural machinery, who in North America were central to early industrialization. Third, estate owners exercised enormous political power. They influenced governments to maintain free trade policies so they could export agricultural products and import whatever machinery they needed, unhindered by tariffs. This made it difficult for local industry to develop. In contrast, in Canada and the United States, tariffs protected local manufacturing in the early stage of industrialization (Richards, 1976; Winson, 1989).

DEVELOPMENT IN CANADA

Canada achieved independence in 1867. Before then, it consisted of a number of British colonies and a vast western and northern territory controlled by the Hudson's Bay Company and other Montreal-based fur trading companies. To secure their trade, these European fur traders relied on alcohol, violence, murder, and the slave traffic of women. They were also responsible for the spread of diseases that were novel to the New World:

> [S]mallpox was the most devastating, often wiping out the majority of individuals in many [I]ndigenous communities and leaving the survivors unable to maintain their settlements and defend their land (Daschuk, 2013).

Until it was abolished in British North America in 1834, slavery was a part of the colonial economy of what became Canada. Initially in New France, Indigenous people from the mid-west were enslaved to French settlers, while later in the Maritimes and Upper Canada it was common for prominent businessmen, politicians, and even church officials to own African slaves (Henry, 2018).

How did Canada become a prosperous country despite its colonial past? First, like Australia, New Zealand, and the United States, Canada was settled by a large number of Europeans who soon overwhelmed the Indigenous population, which was relegated by authorities to reserves to seek out a meagre existence. The European settlers were determined to reproduce or improve the standard of living they enjoyed in the old country. Much of the wealth they produced was therefore reinvested locally. In contrast, when the European powers colonized most of Africa, they set up only small enclaves of white settlers. Their main aim was to exploit local resources and populations, sending nearly all the wealth back to Europe.

Second, Canada's geopolitical position helped it overcome its colonial past and develop economically. Canada served as a major supplier not just of raw materials but also of manufactured goods, such as airplanes to the Allies during World War II. Canada's favourable geopolitical position gave its industry a major boost.

Third, Canadian state policy sometimes protected and stimulated Canadian industrial growth. For example, the 1879 National Policy established a duty on imported manufactured goods. The National Policy sheltered the growth of Canadian industry, then in its infancy, by making foreign-made manufactured goods more expensive. Similarly, the 1965 Auto Pact required that foreign automobile companies wanting to sell cars in Canada duty-free manufacture cars in Canada and use a certain proportion of Canadian-made components. The Auto Pact stimulated the growth of an industry that, directly or indirectly, was responsible at its height for the employment of one-sixth of Ontario's labour force (Brym et al., 2012: 232).

TIME FOR REVIEW

1. How did European influence in much of the Global South since the fifteenth century create underdevelopment and dependency?
2. What three factors hindered development in countries where large landholdings were the predominant form of settlement?
3. Why was industrialization successful in the European colonies that became Canada?

THE NEOLIBERAL ERA: DEBT, STRUCTURAL ADJUSTMENT, AND UPHEAVAL IN THE SOUTH

THE RISE OF NEOLIBERALISM

In recent years, the **neoliberal theory** of economic development has become influential in the highest policy circles. It is worth analyzing because the most important institutions affecting development policies in the Global South adopted it and still apply it today. A central idea of neoliberal theory is that only in societies where markets are free of government interference can competitive entrepreneurs maximize economic growth for the benefit of themselves and the rest of society.

This idea was not always popular. A "hands-off" approach by governments contributed to the severity of the Great Depression of the 1930s, when the North American unemployment rate reached 30 percent. Thereafter, desperation brought a strong desire for a new approach to economic thinking. In the United States, the Democratic Party under Franklin Delano Roosevelt, inspired by the economic thinking of the British economist John Maynard Keynes, took the view that government *should* intervene in the market. Its policies, and those of like-minded governments in Canada, Britain, and elsewhere, favoured massive government spending to stimulate the economy and the establishment of public enterprises where the market had failed to provide viable alternatives.

The "Keynesian" approach to economic development worked well for four decades. Then, in the 1970s, it too began to run into difficulties—specifically, high inflation coupled with low or stagnant economic growth. This situation provided the context for American economist Milton Friedman and his followers to advocate a return to policies that would drastically restrict the role of government in the economy in favour of private market solutions.

What implications did the spread of Freidman's ideas have for the Global South? In the 1970s, international banks and lending institutions had gone on a lending spree. Many governments in the Global South were eager to accept low-interest loans to assist in the industrialization of their nations. The election of Republican president Ronald Reagan in 1981 brought a dramatic change in monetary policy along the lines advocated by Friedman. Among other things, the change entailed a drastic increase in interest rates to deal with inflationary tendencies in the economy. This policy had a global impact.

Interest payments on loans made by the countries of the Global South soared, and a debt crisis, especially acute in South America, ensued. As governments faced defaulting on their loans, international lending agencies put in place a new set of policies that poor debtor countries would have to follow to be bailed out of their dilemma. These policies reflected Friedman's neoliberalism.

The new policy, often called the **Washington consensus**, united the International Monetary Fund (IMF), the World Bank, and the U.S. Treasury around Freidman's neoliberalism. The chief economist at the World Bank, Joseph Stiglitz, wrote that the three pillars of this consensus are austerity, privatization, and market liberalization (Stiglitz, 2003: 53).

In practice, **structural adjustment programs** (SAPs) became the basis of the bailout of the countries of the Global South facing a debt crisis. The IMF and the World Bank offered to help the debtor countries financially if they met a set of harsh conditions: Privatize state-owned enterprises, such as telephone and oil companies and national banks; let in international corporations and goods produced in the developed countries; end tariff protection of local industry and agriculture; radically curtail social welfare programs; encourage new lines of agricultural exports—these were key aspects of SAPs. Proponents of SAPs claimed they were necessary to provide needed economic discipline and achieve economic growth. Critics argued that SAPs would cause social upheaval and misery. As we will see, the critics were right.

Neoliberals assumed that markets work perfectly if left free to do so. Demand for labour, capital, and commodities will equal supply. There will be no unemployment. The only thing that could prevent this ideal outcome is market interference. They argue that if greedy unions constrain the workings of free markets by demanding and receiving excessively high wages, or if meddling politicians encourage the growth of social policies (Employment Insurance, welfare, universal health insurance, and so on), then the market will not be able to work its magic. By implication, if economic problems exist, markets must be unleashed. By this logic, the solution to unemployment, for example, is a reduction in wages.

NEOLIBERALISM AND SAPS AS SOLUTIONS TO POVERTY

Proponents of neoliberal reforms in developing countries argue that they have raised incomes in poor countries and lifted millions of people out of

poverty (Neilsen, 2007). Critics have argued that neoliberalism has produced a dramatic increase in global income inequality, widespread misery, and social dislocation. Who is right? Let's consider the conflicting evidence.

Clearly, there have been winners in the neoliberal global economy. For example, after Mexico opened its economy to foreign capital and free trade, and privatized publicly owned companies, a new class of billionaires emerged. Some benefited from the sale of public-sector enterprises at low prices. Others managed to monopolize lucrative new markets. Notably, the Mexican entrepreneur Carlos Slim became the richest man in the world in 2007—richer than Bill Gates (although Gates was second in 2019 and Slim was sixth; Amazon titan Jeff Bezos was first). Large commercial agricultural producers also benefited from the development of new agro-export industries oriented to the U.S. market.

Brazil, India, and China also opened their economies to foreign corporations and trade, helping them realize exceptional rates of economic growth (see Figure 9.1). New industries have rapidly expanded to serve overseas and domestic markets. New entrepreneurial and professional middle classes have arisen in these countries, while masses of rural poor flood into cities to take up work in new factories that provide incomes considerably higher than those available in rural areas. Not surprisingly, a recent analysis of global income data indicates that the median per capita income of the world has risen substantially in the last few years, fuelled by expanding incomes in Asian countries, notably China, India, and Indonesia (Milanovic, 2018).

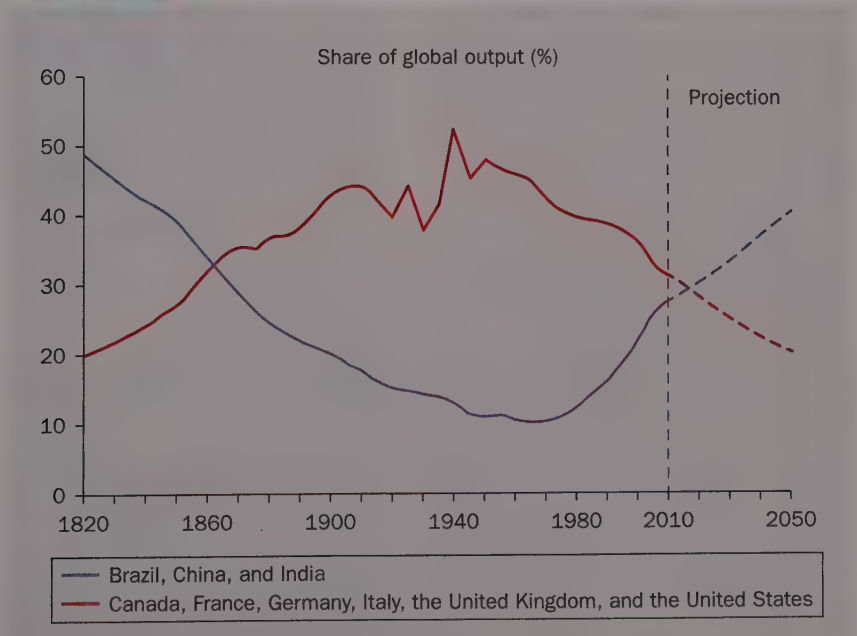
Do the examples prove the success of the neoliberal economic model? The answer depends partly on how we define success. In narrow economic terms, policies associated with neoliberalism have succeeded in some places. The wealth of some countries has increased, as has the standard of living. New infrastructure, including hydroelectric stations, rail networks, highway systems, and air transportation facilities, has been built. These facts suggest development is indeed taking place.

Nevertheless, even among the success stories, glaring problems have emerged. And then there are the many countries that have benefited little or not at all from neoliberalism or have suffered because of it. Let us consider these issues in detail.

Level of Consumption vs. Quality of Life and the Environment

An increase in monetary income in India and China does not mean that the average quality of life has necessarily improved in those countries. Life in rural areas often provides nonmonetary benefits—personal

FIGURE 9.1 Share of Global Output by Percentage, 1820–2050: Brazil, China, and India vs. Canada, France, Germany, the U.K., and the U.S.



SOURCE: *Human Development Report 2013*. "The Rise of the South: Human Progress in a Diverse World." Human Development Report Office, United Nations Development Programme. At hdr.undp.org.

Workers stretch as far as the eye can see in the Cankun Factory, Xiamen City, China.
SOURCE: © Edward Burtynsky, courtesy Nicholas Metivier, Toronto/Howard Greenberg & Bryce Wolkowitz, New York.

security, tranquility, better air quality, the benefits of having family close, and so on—that are not captured by economic indicators of well-being. Life in the city for new immigrants often brings increased personal insecurity with dramatic increases in crime and violence, negative health outcomes associated with heavily polluted air and water, dangerous work environments, and deterioration in diet associated with the consumption of fast food and low-quality street foods.

The kind of unregulated development seen in India and China in recent years has also brought with it massive environmental destruction. For example, to power its expansion, China constructed the massive Three Gorges electric dam project on the Yangtze River. The lake it created has displaced more than a million people and destroyed 13 cities and 140 towns, including historical sites and valuable agricultural land. Lack of regulation means that dangerous and environmentally destructive industries are commonplace, such as those that scavenge waste from electronic devices and break up decommissioned ships in vulnerable marine environments.

Agricultural expansion has denuded vast territories and resulted in the rapid spread of deserts. China is rapidly exceeding the carrying capacity of its ecosystem. Winds carry soil from highly eroded land in the northwest as far away as South Korea and Japan, while air and water pollution affects the health of hundreds of millions of families. At the same time, industrial development has claimed tremendous water resources previously devoted to agriculture. The Yellow River no longer reaches the sea for part of the year or even the downstream agricultural province of Shandong. This situation has imperilled agriculture in an important food-producing region. As renowned environmentalist Lester Brown concluded, "China is on the verge of a massive ecological meltdown" (2003: 11, 37).

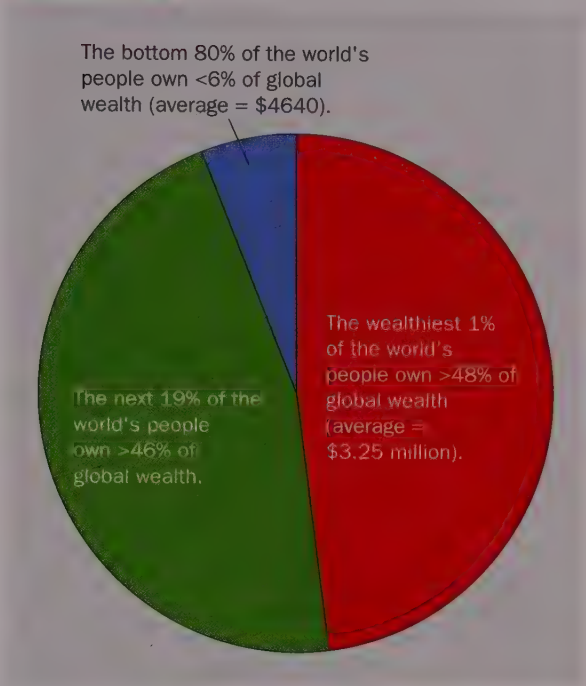
Absolute Poverty and Global Income Inequality

Many parts of the world have not witnessed the kind of income growth that China and India have enjoyed. In fact, as Stiglitz noted, in the last decade of the twentieth century, "the number of people living in poverty has actually increased by almost 100 million. This occurred at the same time that total world income increased by an average of 2.5 percent annually" (Stiglitz, 2003: 5).

Measuring the gap at the global level between people with high and low income is difficult. Various experts use different methods and come up with different results. Nevertheless, as a leading researcher states, "the most basic fact about world inequality is that it is monstrously large; that result is inescapable, whatever the method or definition" (Sutcliffe, 2005).

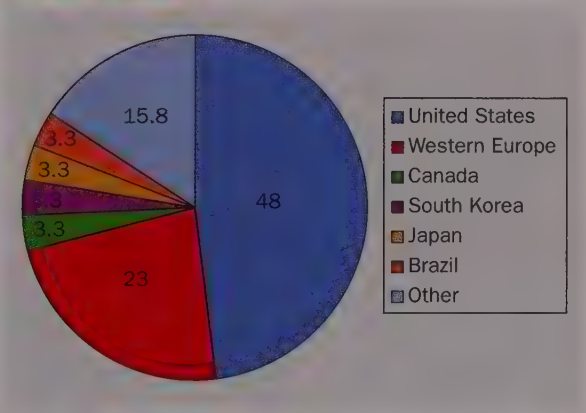
Branko Milanovic notes that the top 5 percent of individuals in the world receive about one-third of total world income, while the top 10 percent get one-half. On the other hand, the bottom 5 and 10 percent of people in the world get just 0.2 and 0.7 percent of world income, respectively. Looked at another way, the income ratio of the richest 5 percent compared with the poorest 5 percent of world citizens is 165 to 1. The richest 5 percent earn in 48 hours about what the poorest 5 percent earn in an entire year (Milanovic, 2005: 15; see Figure 9.2 and Figure 9.3). Furthermore, while recent growth in median per capita global income is a positive development, it hides the reality that the poorest section of the global

FIGURE 9.2 Global Income Inequality, 2014



SOURCE: OXFAM (2015).

FIGURE 9.3 Where Do the Wealthiest 1 Percent of People Live? (percentage)



SOURCE: Milanovic (2012).

population, located mainly in sub-Saharan Africa, has not improved its position at all while the richest 1 percent of the global population continues to get wealthier (Milanovic, 2018).

A recent international project to measure the direction of change in global inequalities provides us with a more accurate estimate of global inequalities than we have had up to now. The International Comparison Program includes data from 146 national statistical agencies and major financial and development organizations, including the United Nations, the World Bank, and the International Monetary Fund. A key finding of the project is that price levels in most Asian countries, notably China, India, Indonesia, and the Philippines—countries with about 38 percent of the world's population—are much higher than was formerly assumed. This means that they have many more poor people than previously thought, with new estimates bringing incomes down some 40 percent in China and India, 17 percent in Indonesia, 41 percent in the Philippines, 32 percent in South Africa, and 24 percent in Argentina. Average incomes did not decline in all of the poorer economies, but increases in Russia, Egypt, Nigeria, and Lebanon were more modest than declines in the Asian countries. Milanovic (2008) concludes that global inequality is much greater than even the most pessimistic analysts thought.

Trends in Inequality within and between Countries

What is the *trend* in global income inequality? Is it decreasing or increasing, and if so, for what time period? Scholars have marshalled evidence that gives us a good idea of inequality trends since the 1930s. The data are better for the developed countries, but trends are apparent for the Global South, too.

Considering inequality within developed countries, the gap between rich and poor decreased from the 1930s to the 1960s. This was the period when the welfare state was being constructed and Keynesian economic policies were being implemented (Bornschier, 2002: 102). For the Global South, the same trend is apparent for only some countries. Brazil and Mexico saw increased gaps between rich and poor between 1950 and 1970. The gap between rich and poor countries was quite stable during these decades.

After the 1970s, when neoliberal policies were implemented, the picture becomes less rosy. Inequalities within countries substantially increased. Between countries, the gap also increased, especially during the 1980s (Bornschier, 2002: 108–10; Braun, 1997). Neoliberal policies were probably not the only factor contributing to this outcome. Other causes of the growing gap between rich and poor include the increasing penetration and integration of national economies by transnational corporations and the ongoing massive technological shift away from industrial production to the digital information economy, especially in the developed countries (see Critical Sociology: Globalization and Work). Nevertheless, neoliberalism helped to widen the gap between rich and poor.

Critical Sociology GLOBALIZATION AND WORK

Much has been made of the term "globalization" in recent years. Globalization is not a recent phenomenon. Economic agents, cultures, technologies, and diseases migrated across vast regions 5000 years ago. However, the scope of globalization is much broader and its pace is much faster than in the past. Moreover, certain features of the current era of globalization are unique.

Digital technologies, including the Internet, and the elimination of trade barriers by free trade agreements around the world are key forces behind globalization today. Among other areas of life, globalization has affected work profoundly.

Where free trade agreements exist, companies can move their capital across borders with little impediment. However, no such liberty is afforded workers. For example, with the signing of the Free Trade Agreement with the United States in 1989, some manufacturers closed up shop in Canada and shipped all their equipment to the southern United States where wages were lower and environmental regulations laxer. When Mexico was brought into the North American free trade zone with the signing of NAFTA in 1994, more companies moved some or all of their operations to Mexico's much lower-wage economy, importing product back into the United States and Canada tariff-free.

Advocates promised that NAFTA would help raise Mexican wages, but they have remained as little as one-fifth the wages paid to Canadian workers in the crucial auto sector, for example. In other sectors, the disparity is much worse. The average monthly wage in Mexico is $412 a month and has remained stagnant in real dollars since 1992 (Weisbrot et al., 2014).

The relative freedom of capital to move to low wage zones has allowed companies to use the threat of relocation as a means of keeping wages nearly stagnant in Canada and the United States. So, as never before, workers in different parts of the world compete against one another in what has been called a "race to the bottom." Since the 1980s, capital flight in the manufacturing sector has gutted the industrial economy of the United States and Canada as firms moved to low wage zones—notably China, which has become the "workshop of the world."

In North America, millions of skilled and semi-skilled industrial workers have been laid off and organized labour has suffered serious setbacks. The level of manufacturing employment in Canada has fallen to its second-lowest level since record-keeping began in 1976. Manufacturing now employs less than 10 percent of the Canadian labour force (Capeluck, 2015). Many well-paying jobs with valuable benefit packages covering health care and a company pension have been replaced by precarious (part-time or seasonal) labour with few if any benefits attached (Winson and Leach, 2002).

Critical Thinking Questions

1. How are companies and workers unequally advantaged by the free trade agreements that came with the current era of globalization?
2. What do you think might be some reasons why NAFTA has failed to raise Mexican wages?

Growth Needs Strong States

Neoliberal policies have not stimulated growth in the Global South. To the contrary, growth rates were higher in the decade before the introduction of SAPs (an average of 2.5 percent between 1960 and 1979) than in the era when SAPs were imposed by international lending agencies (0.0 percent between 1980 and 1998; Brym et al., 2005: 95). But what does history teach us about the policies the *rich* countries followed to encourage industrialization? Did they follow the tenets of neoliberalism?

Aside from Britain, the first industrializing country, they did not. As French political economist François Chesnais (2004) noted, "The United States, France, Germany and the other industrialised countries [including Japan] benefited from selective *protection* of their home market for over a century or more" (my emphasis). This gave them time to grow until they could compete with Britain in world markets. Only the countries of the Global South that fell under the sway of neoliberalism have lacked the opportunity to nurture their industrial and technological base. "Time has been denied to them," wrote Chesnais.

Contrary to neoliberal theory, minimal state involvement is about the last thing industrializing countries need. In recent decades, the rapid industrialization of the "Asian tigers"—South Korea, Taiwan, Singapore, and, later, China and India—depended on strong states and considerable state involvement in the economy. For example, governments in South Korea and Taiwan after World War II were highly centralized and authoritarian. They succeeded in carrying

out sweeping land reforms that eliminated the class of powerful landowners—the same class that opposed protectionist policies in Latin America. The governments of these two countries opted for a strong industrial policy that marshalled the resources of the state to develop infrastructure and use state credit to fund investment in key industrial sectors. They kept control of industrial development by preventing foreign corporations from taking over their expanding industries. They also used their power to repress labour movements, which kept wages down and made emerging industry highly competitive in the world market.

China followed suit. The all-powerful Communist Party organized a top–down transformation of the economy to encourage foreign investment—but on their terms rather than terms dictated by neoliberal institutions. The Communist Party organized massive infrastructure projects that encouraged industrial investment. It kept wages low and used violence to prevent the formation of independent labour organizations.

Women under Neoliberalism

Other signs exist that neoliberalism has failed to produce the results claimed by its advocates. The dismantling of many national banks by IMF policy prescription undermined cheap credit to small farmers and imperilled rural incomes in many poor countries (Rodriguez Gomez and Torres, 1996: 157–58). Trade liberalization encouraged the import of heavily subsidized agricultural commodities from the developed countries. They undermined rural incomes, as prices for food produced by small farmers plummeted in the face of an incoming tide of low-cost food. Because of such policies, millions of rural poor have been forced off the land and into already overcrowded towns and cities. Millions more migrated to the developed world, some illegally and at great danger to themselves. Such migrants have become the source of a huge global economy in recent years. They typically do menial work and send money back to family members in Mexico, the Philippines, and elsewhere.

In some parts of the Global South, such as India and Thailand, neoliberal policies have been especially hard on women, partly because women form the bulk of the agricultural workforce (Shiva, 1993: 232). Elsewhere, in countries as diverse as Nicaragua and Nigeria, women have had to raise families on their own as their husbands are forced to migrate to the cities or to the developed world in search of cash income. Evidence suggests that these circumstances are breaking down long-standing patriarchal structures and forging new ties of solidarity among women as they strive to cope with the new realities, but the change involves much suffering.

Since 1999, the World Bank and the IMF have implemented policies that they believe promote gender equity. However, critics point out that these new policies have been weakly implemented and have done little to eliminate gender barriers for women wanting to access the paid workforce or engage in production for export markets. Nor do they tackle the substantial gender inequality that exists in the households of the Global South (Brym et al., 2005).

TIME FOR REVIEW

1. How did countries in the Global South end up having to accept the policies of austerity, privatization, and market liberalization that were dictated by the World Bank and the International Monetary Fund?
2. Does it make sense to limit our understanding of "development" to an increase in the gross national product?
3. While measuring inequality is a difficult task, what can we conclude about the level of world inequality today?

STATE VIOLENCE, WAR, AND THE PRODUCTION OF POVERTY

Military aggression and war have helped undermine development in much of the post-World War II era, and they therefore deserve to be discussed at some length. During the Cold War, mutually assured destruction by nuclear weapons made military confrontation between the Soviet Union and the United States out of the question. Nevertheless, both countries used their economic and military might to reshape the world during this period.

Under the guise of making the world "safe for democracy" and "fighting communism," the United States has pursued a neocolonial policy throughout the post-World War II era. It has been directly or indirectly involved in a series of military *coups d'état* in Latin America and elsewhere from the 1950s to the late 1970s, beginning with the CIA-organized overthrow of the Iranian government in 1953 and the invasion of Guatemala in 1954. The government it installed in Guatemala prepared the ground for a series of pro-American regimes that have carried on

continual campaigns of **state terrorism** that have killed many tens of thousands of Guatemalans, often with unspeakable brutality (Falla, 1994). More than a million citizens have been forced to flee the violence.

For most of the decades that followed, Washington provided military aid, training, and diplomatic support for these regimes (Gareau, 2004: 63). When it became politically impossible for Washington to provide such assistance because of the Guatemalan military's gross human rights abuses, the Israeli government stepped in to provide military aid and training (Marshall, Scott, and Hunter, 1987). In the Marshall Islands in the South Pacific, the U.S. military used its dominance after World War II to designate part of this vast archipelago as a testing ground for the nuclear bombs it was developing. The fallout from these tests contaminated vast areas of the Marshall Islands and exposed islanders to high levels of radiation, with long-term devastating consequences (Johnston and Barker, 2008).

The "domino theory" held that if one country fell under communist influence, its neighbours would soon follow suit. Operating with the domino theory in mind, the United States began a decade-long military intervention in Vietnam in the 1960s. This intervention followed years of French colonial domination. America's undeclared war killed more than a million North Vietnamese military personnel, between 500 000 and two million civilians, and more than 58 000 American military personnel. The war destroyed Vietnam's economic infrastructure; the country has only recently shown signs of recovery and economic expansion.

The main American rival on the world stage at this time was the Soviet Union, which also sought to extend its influence and promote the economic model it favoured. In so doing, it used military force to block efforts to democratize and liberalize authoritarian communist regimes within its sphere of influence (Hungary in 1956, Czechoslovakia in 1968) while lending its support to pro-Soviet governments elsewhere in Eastern Europe with strong authoritarian tendencies. Throughout the Cold War, the Soviet Union provided military equipment, training, and advisers to various authoritarian regimes in the Middle East, notably Syria, Algeria, and Iraq under Saddam Hussein, as it competed with the United States for influence in the region. It refrained from supplying the most advanced weaponry to these regimes, however, for fear that doing so would drag it into direct military confrontation with the Americans (Antonenko, 2001).

Soviet economic and military aid also assisted the struggles of different movements around the globe to remove colonial and neocolonial domination. It bolstered the Vietnamese war effort against the United States, helped the Cubans resist the American economic blockade of that country, and provided arms and materiel to Angola, Mozambique, and Nicaragua in their war against "contra" mercenary armies and the apartheid South African government. Such countries as Cuba and Nicaragua turned to the Soviet Union for military aid only after the United States had fostered economic destabilization and engaged in covert military operations with the intention of bringing down their governments.

In the 1970s, the United States, with the help of allies such as France, provided military equipment, extensive training, and expertise to help install military governments in Brazil, Uruguay, Chile, Argentina, and the Dominican Republic. When these oppressive military regimes came to power, they typically forged strong ties with multinational corporations, while suppressing trade unions and popular organizations and groups that opposed them.

The oppression they unleashed was brutal. In Argentina, the number of citizens killed by the pro-American dictatorships exceeded 30 000, with members of the younger generation being the principal victims (Marchak, 1999). Increasingly, the tactics of repression developed by these dictatorships in Latin America are being used in other part of the world to stamp out dissent.

In the 1970s, popular struggles against a staunchly pro-American dictatorship in Nicaragua, and European colonial regimes in Angola and Mozambique, were successful in establishing governments that sought to redistribute land and wealth, and establish more democratic forms of popular participation. In their first years in power, they made dramatic strides in combating illiteracy and expanding health care (Vilas, 1986).

In the 1980s, the U.S. government sponsored illegal arms deals to covert armies to fight the revolutionary government in Nicaragua and support the South African government in its campaign to destabilize Mozambique and Angola (Gareau, 2004; Marshall, Scott, and Hunter, 1987). In Mozambique, the South African strategy of destabilization was responsible for destroying 718 health facilities and schools accommodating 300 000 students between 1981 and 1986 (Gareau, 2004: 139–40). In Nicaragua, more than 50 000 people were killed or wounded in what was called the "contra war."

In southern Africa, a task force appointed by the secretary general of the United Nations estimated that damage to Mozambique, Angola, and Zimbabwe from South Africa's destabilization campaign amounted to $60 billion (1988 prices) between 1981 and 1988, an immense sum for such desperately poor countries. Moreover, 1.5 million people died from violence or violence-related disease and famine, and half the population of Mozambique and Angola was displaced (Gareau, 2004: 141).

In the twenty-first century, war has continued to plague parts of the Global South, particularly sub-Saharan Africa and the Middle East, and has undermined the benefits that might come from development assistance. Post-communist Russia has become a major arms vendor. The Russian defence industry now depends on arms exports for its survival, and private interests in Russia increasingly act without government support to penetrate the lucrative Middle East arms market (Antonenko, 2001). New actors have also emerged to pursue self-serving policies that fuel war, economic turmoil, and social disruption and dislocation, China chief among them. For example, China's pursuit of oil in Sudan has led it to support the Sudanese regime, which is responsible for the ongoing genocide in Darfur.

RESISTANCE TO THE NEOLIBERAL NEW WORLD ORDER

GOVERNMENT RESISTANCE

I end our discussion by considering how governments and people in the Global South, and most recently in the developed north as well, have resisted neoliberal policies.

Such resistance has been particularly acute in Latin America. Since 2000, Argentina, Brazil, Bolivia, Ecuador, and Venezuela have elected governments that oppose neoliberalism. These governments have been deeply concerned with the increasing concentration of land ownership, the concomitant spread of landlessness, and skyrocketing urban poverty in recent decades. They have sought to aid the landless and the urban poor, and in some cases to nationalize key resource industries and capture the profits that for decades went largely to transnational companies with little local benefit. The Chavez government in Venezuela used its oil wealth to provide substantial aid to other poor countries in Latin America. In fact, it provided more aid than did the United States, which has an economy 90 times the size of Venezuela's ("Chavez," 2007).

Women members of the Movimento Sem Terra (MST), Brazil's Landless Workers Movement, protest against then United States President George W. Bush's visit to Brazil. The march also marked support of International Women's Day.
SOURCE: © Carlos Cazalis.

POST-NEOLIBERALISM

The rejection of the neoliberal idea that free markets ensure development has inaugurated what some observers call the "post-neoliberal era" in the Global South. In the post-neoliberal era, alternative development strategies have been proposed. For example, in Latin America, **import substitution** has been widely recommended over neoliberalism as a superior development model. Import substitution involves replacing foreign-produced manufactured goods with domestically produced manufactured goods. Various forms of state intervention are deemed necessary for a successful import substitution strategy. They include government support for local technical innovation, labour force training, public–private sector partnerships, programs aimed at increasing social cohesion among the population, and so on.

It is, however, questionable whether import substitution is a serious challenge to the neoliberal model and the social inequities it spawned (Leiva, 2008). Critics of the import substitution strategy acknowledge that it may improve the competitive advantage of some countries in the global economy. It may also blunt some of the social damage caused by neoliberalism. However, they insist that import substitution does not challenge either the power of transnational corporations that have come to occupy a privileged position in many underdeveloped countries or the inequitable power relations that their dominance implies. Critics conclude that import substitution is more of a painkiller than a cure for the problem of underdevelopment.

POPULAR RESISTANCE

Social movements started challenging the neoliberal development model in 1999, when the World Trade Organization met in Seattle to start a round of trade talks that would open up markets around the world. Some 40 000 protesters gathered to demonstrate against the meeting, fearing the consequences of the new policies for Indigenous peoples, the environment, and global inequality. The violent police response and the resistance of the protesters were dubbed the "Battle of Seattle."

To formulate alternatives to the neoliberal agenda, the World Social Forum held its first meeting in 2001. It brought together activists, intellectuals, and members of nongovernmental organizations from around the world in Porto Alegre, Brazil, in 2001. Their statement of principles set out their aims as follows:

> The alternatives proposed at the World Social Forum stand in opposition to a process of globalisation commanded by the large multinational corporations and by the governments and international institutions at the service of those corporations' interests, with the complicity of national governments. They are designed to ensure that globalisation in solidarity will prevail as a new stage in world history. This will respect universal human rights, and those of all citizens—men and women—of all nations and the environment and will rest on democratic international systems and institutions at the service of social justice, equality and the sovereignty of peoples (World Social Forum, 2009).

Since then, the World Social Forum has met annually in different places in the Global South.

Another important example of popular resistance to neoliberalism in the Global South is *Via Campesina*, an international organization of peasant farmers, rural women, and landless workers that seeks to achieve social justice and gender parity in the context of sustainable agricultural production (Borras, 2008). This movement has called for the establishment of "food sovereignty" that challenges the increasing dominance of global seed companies and food transnationals. It calls for the right of millions of small holders in the developing world to control their own food systems (Witmann, Desmarais and Wiebe, 2010: 2).

The Occupy Wall Street Movement erupted in more than 80 countries around the world in 2008, a reaction to growing income inequality during the Great Recession of 2008–09. In the United States, many people were disgusted by the failure of governments to prosecute any of the wealthy people believed to be at the heart of decisions that brought on the financial crisis of 2008, while millions of ordinary Americans lost their jobs and their houses. In Europe, government austerity measures in the face of economic slowdown and skyrocketing unemployment were the most prominent motivators. Everywhere, stark economic inequalities brought on by three decades of neoliberal policies provoked anger and spurred tens of thousands to demonstrate in the streets. We can expect other, similar social movements to erupt in coming years, especially movements linked to the growing threats of climate change and environmental ruin.

About 310 000 demonstrators gathered in New York City on September 21, 2014, to advocate global action on climate change. It was the largest climate change march in history.

SOURCE: © Stelya|Dreamstime.com—People's Climate March NYC Photo.

SUMMARY

1. **What are the stage and modernization theories of development and why are they problematic?**
   The stage theory of economic development holds that societies proceed through various phases of development much as biological organisms do. Contemporary American market society is considered the ultimate stage. Modernization theory argues that value orientations strongly influence how successfully countries develop. In this view, countries in which people have a high need for achievement and value competitive behaviour are more likely to develop successfully. Both theories ignore the history of exploitative relationships between rich and poor countries and the degree to which rich countries undermined the economic, social, and political structures of the Global South, thus condemning them to underdevelopment for centuries.

2. **What is dependency theory and why is it problematic?**
   Dependency theory holds that the most important mechanism blocking the development of poor countries is their exploitation by rich countries. While more historically accurate than stage and modernization theories, dependency theory is problematic insofar as it implies that certain geographical regions exploiting other geographical regions led to the underdevelopment of the latter. A more accurate rendering of the process of underdevelopment examines how certain *classes* in metropolitan countries, with their allies in the colonies, acted to undermine colonial economies in the pursuit of profit over several centuries.

3. **What is problematic about using gross national product per capita as the sole indicator of development?**
   The gross national product per capita of a country ignores other factors that influence human well-being, such as education, personal health, and environmental health. For this reason, social scientists increasingly use more comprehensive development indicators, such as the United Nations' **Human Development Index** (HDI) (2014), as a measure of development.

4. **Haven't certain poor countries been able to escape from poverty in recent decades?** China, Brazil, and other countries are experiencing rapid increases in gross domestic product per capita. However, the associated costs for society and the environment have often been high. Moreover, global inequalities remain staggering, and new evidence indicates that the gap between rich and poor countries is wider than earlier believed.

5. **Why is resistance to neoliberalism increasing?** Policies of austerity, privatization, and free trade promoted by the World Bank and the International Monetary fund did not generally stimulate economic growth. Moreover, these policies created considerable social disruption and suffering. In Latin America in particular, several governments have resisted the worst aspects of these policies and opted for more government intervention with increased social welfare provisions. In recent years, growing income inequality and environmental degradation have stimulated opposition to neoliberalism in the world's rich countries, too.

QUESTIONS TO CONSIDER

1. Do you think global inequality will change over the next 25 years? In what ways? Why do you think these changes will occur? If you think global inequality will remain the same, explain why.
2. Should Canadians do anything to help alleviate global poverty? Why, or why not? If you think Canadians should help end global poverty, then what should we do?
3. What circumstances allowed some countries to escape underdevelopment in the late twentieth and early twenty-first centuries?

GLOSSARY

Capitalism (p. 201) is an economic system based on profit-seeking in competitive markets. It is associated with dynamic technological development, the growth of class inequality, and accelerating environmental destruction.

Deindustrialization (p. 206) is a process, linked to neoliberal policies, that facilitates businesses moving to the lowest wage jurisdictions nationally or abroad, resulting in social dislocation and economic decline in older industrial regions.

Dependency theory (p. 203) is an explanation of uneven global development that stresses the exploitative relationships that have existed between Europe and the Global South, to the detriment of the latter.

Gross domestic product (GDP) (p. 201) is the dollar value of all goods and services produced in a country in a year. Per capita GDP is GDP divided by the number of people living in the country. It is a measure of a country's wealth per person.

The **Human Development Index** (HDI) (p. 217) is a more comprehensive indicator of progress in development than is gross domestic product per capita. HDI incorporates measures of educational attainment and literacy and health outcomes.

Import substitution (p. 216) involves replacing foreign-produced manufactured goods with domestically produced manufactured goods. Various forms of state intervention are deemed necessary for a successful import substitution strategy.

Modernization theory (p. 202) argues that economic growth and development can best be achieved if the values underlying market capitalism are aggressively fostered.

Neoliberal theory (p. 208) calls for the elimination of government involvement in the economy, which presumably allows free markets to achieve economic growth and development.

Stages of development (p. 202) in W. W. Rostow's theory are the developmental phases through which societies supposedly pass. Rostow believed that modern American capitalism represents a final developmental stage characterized by sustained economic growth.

State terrorism (p. 214) is a deliberate act of physical or psychological violence perpetrated by state organizations (the army, secret police, etc.) to intimidate and coerce certain groups by causing fear, anxiety, panic, and horror.

Structural adjustment programs (SAPs) (p. 208) are policies imposed on debtor countries by the World Bank that entail privatizing of state enterprises, opening of debtor economies to imports and capital from developed countries, eliminating social welfare and poverty reduction programs, and meeting debt obligations to the financial institutions of the rich countries.

Terms of trade (p. 204) refers to the ratio of the price of exports to the price of imports.

Underdevelopment (p. 204) is the idea that the development of Europe required the exploitation of the Global South and undermined its economic development.

The **Washington consensus** (p. 208) is the shared view of the International Monetary Fund, the World Bank, and the U.S. Treasury Department that emerged in the late 1970s, promoting a neoliberal approach to economic development and stabilization in the Global South.

PART 4

INSTITUTIONS

Illustrated by Aaron Millard.

CHAPTER 10

FAMILIES

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© Compassionate Eye Foundation/Natasha Alipour Faridani/Getty Images.

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Understand historical change in family life.
- Discern variation over time and place in meanings ascribed to families.
- Identify the interactions, relations, and processes that constitute family life.
- Understand how families are constructed.
- Define, summarize, and apply various concepts and theoretical perspectives concerning families.
- Understand how family relations are influenced by interacting factors, including race, ethnicity, gender, sexuality, class, ability, and citizenship.
- Identify key challenges to family relations today.

INTRODUCTION

Alfred Kinsey was a biologist who spent the first 20 years of his professional life collecting and analyzing 100 000 specimens of the gall wasp. His mania for counting and classifying them was driven by his awe of natural diversity.

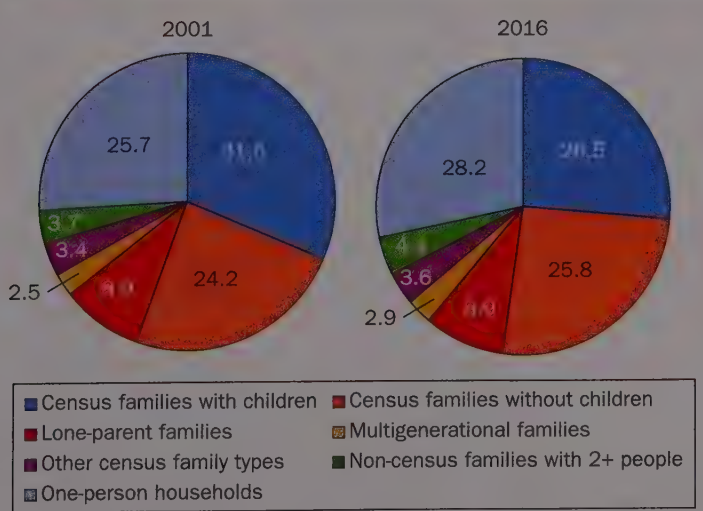
Beginning in the 1930s, Kinsey turned his sights to sexual diversity among humans. He and his assistants conducted thousands of interviews on human sexual behaviour, and he became the world's first self-proclaimed sexologist. In their landmark books *Sexual Behavior in the Human Male* (1948) and *Sexual Behavior in the Human Female* (1953), Kinsey and his colleagues shocked the world by asserting, among other things, that homosexuality is so common it cannot be considered a pathology. (Remember, this was seven decades ago.) Kinsey's watchword was something that every natural scientist and every social scientist heeds: "Variation is everything."

Variation is certainly the first thing that comes to a sociologist's mind when thinking about families. Families vary along many dimensions: the number of generations, adults, children, and genders and races they encompass; the sexuality of family members and the degree to which sexual relations are perceived as permissible only among some adult family members; the legal status or lack of legal status (marriage) binding the adults in the family; the degree to which family members work inside or outside the household; and much else. Official statistics from the census capture only a fraction of this variation (see Figure 10.1).

Family forms also tend to vary historically and across societies. Moreover, making sense of this diversity becomes especially daunting when we recognize we are not dealing with gall wasps. We are dealing with human beings who experience emotions and attach meanings to people, their interactions with others, events, and things in their environment. To cite just one example, most people experience love and intimacy in their family, but some experience fear and loathing. In 2016, one-third of homicides in Canada involved the victim being killed by a family member (David, 2017). Classifying 100 000 unthinking gall wasps seems easy compared to understanding the variety of family types.

Families are not just sites of social interaction and intimate relations. They also form a social institution, that is, a patterned system of behaviour, social relations, and social functions. Ideas about the appropriate composition, roles, norms, and values of families are entrenched in laws governing marriage and divorce, and in policies regarding education, social welfare, and immigration. A complete sociological understanding of families must take this aspect of family life into account, too.

FIGURE 10.1 Types of Households, Canada, 2001 and 2016 (percentage)



Statistics Canada definition of "census family"

Census family: A married couple and the children, if any, of either and/or both spouses; a couple living common law and the children, if any, of either and/or both partners; or a lone parent of any marital status with at least one child living in the same dwelling and that child or those children. All members of a particular census family live in the same dwelling. A couple may be of opposite or same sex. Children may be children by birth, marriage, common-law union or adoption regardless of their age or marital status as long as they live in the dwelling and do not have their own married spouse, common-law partner or child living in the dwelling. Grandchildren living with their grandparent(s) but with no parents present also constitute a census family.

SOURCES: Statistics Canada (2017c; 2018a).

In this chapter, we touch on all these features of family life, mindful of the myriad ways in which the meanings, practices, and processes of family have changed and, in some cases, remained remarkably the same.

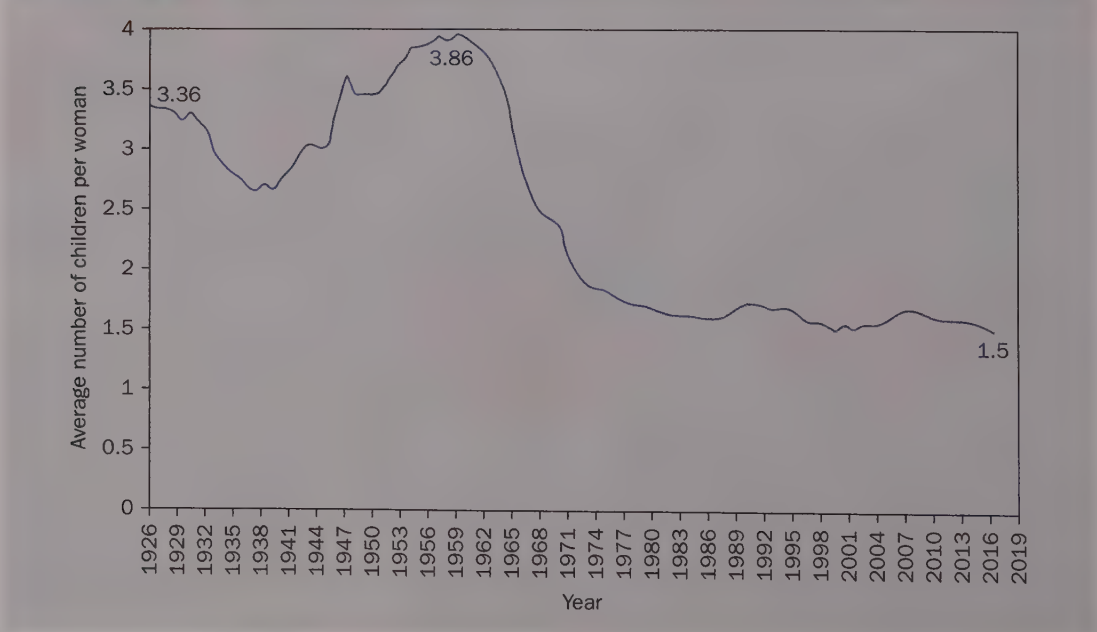
CHANGES IN FAMILIES AND FAMILY RELATIONS

The **replacement rate** is the number of live births per 1000 women in a population that must occur for the size of the population to remain constant over time (ignoring immigration and emigration). The replacement level is 2.1. This means that, for a population to neither shrink nor expand, women must have an average of 2.1 children—one to replace her when she dies, one to replace her mate when he or she dies, and 0.1 to compensate for the fact that some children die before they can have children themselves.

In Canada, the replacement level fell below 2.1 in 1971 (Statistics Canada, 2018b). Today, women who have children are doing so later and having fewer of them than they did in earlier years (see Figure 10.2). On average, women had their first child at age 28.5 in 2011, compared to 24 between the 1950s and mid-1970s (Statistics Canada, 2018b). The average number of children under 18 in a family was 1.1 in 2016, compared to 2.7 in 1961 (Kobayashi and Khan, 2018). With the number of children on the decline, families are becoming smaller. At the same time, the number of adult children living at home is rising. In 1981, fewer than 27 percent of children between the ages of 20 and 29 lived with their parents. By 2011, the figure had risen to more than 41 percent (Statistics Canada, 2012). Many of these children are so-called **boomerang kids** who leave home and then return, typically for financial and/or personal reasons (Berman, 2018).

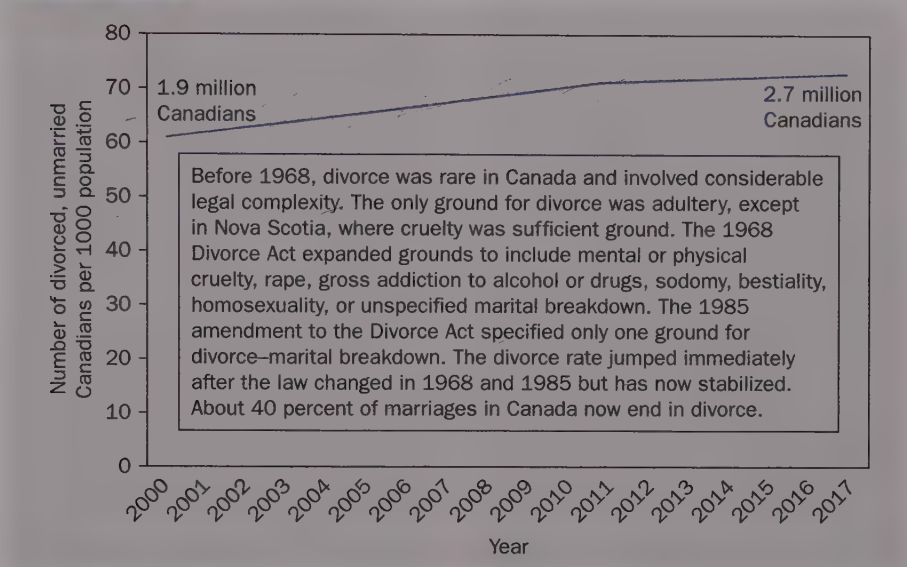
Since 2016, Statistics Canada has defined a **census family** as married and common-law couples, same-sex or opposite-sex, with or without children, and lone-parent families (refer back to Figure 10.1 for the full, official definition). A census family shares the same household. The composition of households is also changing. In 2016, one-person households, meaning persons living alone without family members, accounted for just over 28 percent of all households and were the most common type for the first time in census history (Statistics Canada, 2017b). Lone-parent families and households are becoming more common partly because separation and divorce are more common than they used to be. About four out of ten marriages end in divorce, and the

FIGURE 10.2 Total Fertility Rate, Canada, 1926–2017



SOURCES: Statistics Canada (2018b; 2019).

FIGURE 10.3 Divorced, Unmarried Canadians per 1000 Population, 2000–17


Number of divorced, unmarried Canadians per 1000 population
80
70
60
50
40
30
20
10
0
1.9 million Canadians
2.7 million Canadians
Before 1968, divorce was rare in Canada and involved considerable legal complexity. The only ground for divorce was adultery, except in Nova Scotia, where cruelty was sufficient ground. The 1968 Divorce Act expanded grounds to include mental or physical cruelty, rape, gross addiction to alcohol or drugs, sodomy, bestiality, homosexuality, or unspecified marital breakdown. The 1985 amendment to the Divorce Act specified only one ground for divorce–marital breakdown. The divorce rate jumped immediately after the law changed in 1968 and 1985 but has now stabilized. About 40 percent of marriages in Canada now end in divorce.
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
Year

SOURCES: Statistics Canada, "Population Canada, 2000–17"; Statista (2019).

number of divorced Canadians who remain unmarried is increasing absolutely and as a proportion of the population (see Figure 10.3). About 80 percent of lone-parent families are headed by women, but the proportion of single-father family households is growing (Kobayashi and Khan, 2018).

Most Canadians get married, but the proportion of married couples is steadily falling as the proportion of common-law couples increases. The average age of Canadians who get married for the first time is now around 30 (Milan, 2013). Increasingly, people between the ages of 25 and 29 are likely to cohabitate or live "common law" rather than marry. Whereas only 6.3 percent of couples were living common law in 1981, this percentage rose to 21.3 percent in 2016 (Statistics Canada, 2017b). People are more likely to cohabitate in Quebec than elsewhere in Canada (Statistics Canada, 2017b). This difference is associated with a shift away from institutionalized Catholic norms and toward a norm of individuals making their own personal decisions about marriage (Laplante, 2006).

Same-sex marriage was legalized in Canada in 2005. By 2011, more than 30 percent of same-sex couples were married, compared to 13.5 percent in 2006 (Milan, 2013). Moreover, individuals who define themselves as part of the LGBTQI2SA community (lesbian, gay, bi-sexual, transgendered, queer or questioning, inter-sexed, two-spirited, and allies) form a significant part of the milieu of contemporary family relations.

More than one-quarter of Canadian households have children under the age of 25 living at home. Parents typically raise their children, but increasingly this responsibility is shared with grandparents as the proportion of households containing three or more generations increases (Statistics Canada, 2017b). This increase is partially linked to immigration trends and related growth in the visible minority population. According to the 2016 census, more than one in five Canadians were foreign-born and one in five was a member of a visible minority group. Most immigrants to Canada in 2016 were from Asia, with the Philippines, India, and China leading the list of source countries and together accounting for more than 38 percent of all immigrants (Statistics Canada, 2017c).

Finally, the economics of family life has changed in recent decades. From 1976 to 2016, the proportion of two-parent families with children living at home in which both parents work in the paid labour force has almost doubled (Statistics Canada, 2016). This trend is due to women's increasing participation in the paid labour force, made necessary by the fact that a single income is often insufficient to buy the food, clothing, shelter, and other things that family members need or want. In short, just about all aspects of family life have changed in some way in the past five or six decades (Gazso and Kobayashi, 2018).

TIME FOR REVIEW

1. What demographic trends may account for the increase in single-person households?
2. Outside of changes in the composition of households, what trend suggests that forming an intimate partnership and living together is still important?

OUR APPROACH

The changes in family relations that we have reviewed suggest that the way we practise family life is far different from the way our parents' generation practised it. However, families have also remained the same in some respects. For example, families are becoming smaller on average and some people are forming partnerships in new ways, but most Canadians still live together in families. While polyamorous "throuples" (three people in a committed relationship) raising children may seem innovative today, the practice of caring for children in families has persisted over time (see Critical Sociology: Polyamory and the Law).

As we will see, continuity and change are evident with respect to family meanings, processes, and practices (Gazso and Kobayashi, 2018). *Meanings* are definitions of families, some embedded in institutions like law and policy. *Practices* are activities and behaviours that people engage in as part of family life. *Processes* are family events and trajectories.

TIME FOR REVIEW

1. Given what you have read so far, what are some different meanings people can assign to families?
2. Apart from those features that have been mentioned, what is another practice of family life that has changed in recent decades? What is another practice that has remained essentially the same? Hint: Think of how people go about providing food, shelter, and clothing to family members.
3. What are some of the social processes that can change individuals' family lives over time?

Critical Sociology — POLYAMORY AND THE LAW

To illustrate that polyamorous throuples can and do raise children in families in Canada—and are legally recognized as doing so—the following is excerpted from a newspaper article about a precedent-setting case.

In what is believed to be a legal first in Canada, a court in Newfoundland and Labrador has recognized three unmarried adults as the legal parents of a child born within their "polyamorous" family. . . . In this case, the St. John's family includes two men in a relationship with the mother of a child born in 2017. . . .

"Society is continuously changing and family structures are changing along with it," says the decision by Justice Robert Fowler of Newfoundland and Labrador Supreme Court's family division. . . .

The April 4 decision says the unconventional family has been together in a **polyamory** arrangement for three years, but the biological father of the child is unknown. The family members are not identified in the decision, which was released Thursday by the court.

It's not the first time a Canadian court has ruled that a family can have three legally recognized parents. In 2007, for example, the Ontario Court of Appeal recognized both women in a lesbian couple as the mothers of a child whose biological father was already deemed a legal parent. But the three adults in that case were not in a relationship. . . .

Lawyers for the province's attorney general argued that the provincial Children's Law Act does not allow for more than two people to be named as the legal parents of a child. In his decision, Fowler acknowledged that was the case, but he stressed that the court's opinion hinged on what was in the best interests of the child.

Fowler said the child was born into a stable, loving family that is providing a safe and nurturing environment. . . .

Critical Thinking Questions

1. If there takes place a substantial rise in the number of throuples having and raising children, would it resolve any social problems?
2. If there takes place a substantial rise in the number of throuples having and raising children, would it cause any social problems?

SOURCE: Michael MacDonald. (2018). "3 Adults in Polyamorous Relationship Declared Legal Parents by N. L. Court." *CBC News* 14 June 2018. © CBC Licensing.

KEY CONCEPTS

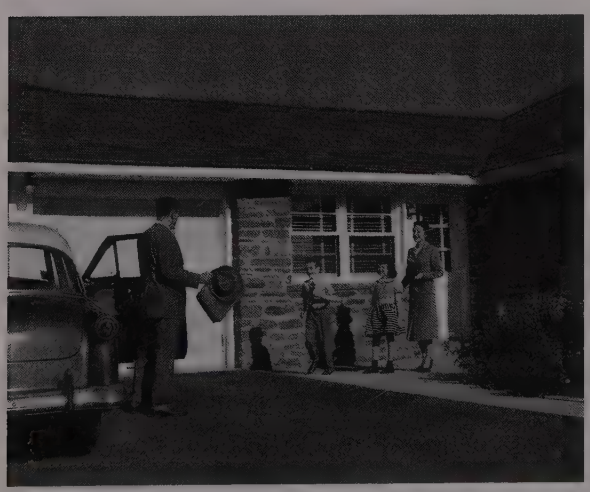
FAMILY AND KIN

The **nuclear family** consists of a husband, wife, and at least one child. This classic definition of the nuclear family was provided by George Murdock (1949 [1960]: 1):

> . . . a social group characterized by a common residence, economic cooperation, and reproduction [including] adults of both sexes, at least two of whom maintain a socially approved sexual relationship, and one or more children, own or adopted, of the sexually cohabitating adults.

This family structure was especially prevalent in Canada in the 1950s and early 1960s, a period that some observers call the "golden age" of family life (Coontz, 1995). In this period, the wife's role tended to be restricted to the home (the "private sphere") and the husband's role tended to be paid work (the "public sphere"). More recently, legalization of same-sex marriage and the growing trend toward common-law partnerships for both opposite-sex and same-sex couples has challenged what we mean in defining families as nuclear; all family forms that include two parents and at least one child are considered nuclear.

Murdock defined **kin** as people we think of as family but who may not share our household—for example, uncles and grandmothers living in their own households. Today, kin are commonly known as members of the **extended family**. If more than one generation of a family lives in a household, it is called a **multigenerational family**. We can also distinguish the **family of orientation** (the family in which one grows up) from the **family of procreation** (the family created by two adults when they have their first child) (Mitchell, 2018).



Some observers refer to the 1950s as the "golden age" of family life.

SOURCE: © ClassicStock/Alamy.

We no longer equate family with household composition. Nor do we assume the existence of heterosexual relations or of procreation in families. Today, family relations often transcend households and lineages created by blood or marriage. New concepts have been invented to characterize the new reality. For example, the notion of **fictive kin** was introduced to signify close relationships with people perceived as family but that do not assume marriage or commitment, procreation, or adoption (Isben and Klobus, 1972). Research on low-income African American families in the United States identifies fictive kin relations as including friends involved in reciprocal exchanges of support such as caregiving to such an extent that they became as meaningful to people as actual kin relations (Stack, 1974). Among LGBTIQ2SA people who have historically been marginalized from participation in family life, the idea of creating "families of choice" has long been practised (Weeks, Heaphy, and Dononvan, 2001).

According to Morgan (1996: 11), family refers to practices of parenting, kinship, and marriage, and their related obligations, expectations, and interactions. He regards the expression of emotions and the work of regulating emotions as the core family practices. In his view, the practices themselves constitute family, and since they are context-specific and ideologically shaped, they differ across the world (Morgan, 2011).

In Canada, process-based definitions of family relations are becoming increasingly popular (McDaniel, Tepperman, and Colavecchia, 2019). For example, the Vanier Institute of the Family defines families in terms of the processes they share rather than their structural composition. Examples of such processes include dependency, intimacy, protection—and violence. Of course, far from all households are characterized by family violence, but some are, and this aspect of family life cannot be ignored. Family members may experience physical, sexual, and psychological abuse at the hands of family members. The most common form of family violence is intimate partner violence, typically involving men acting violently toward their female partners (Nason-Clark, 2018).

Given these new definitions and the changes we observed earlier, we contend that family is perhaps best defined today subjectively, as the close relations, including kin and non-kin, who *feel* like family to individuals.

MARRIAGE

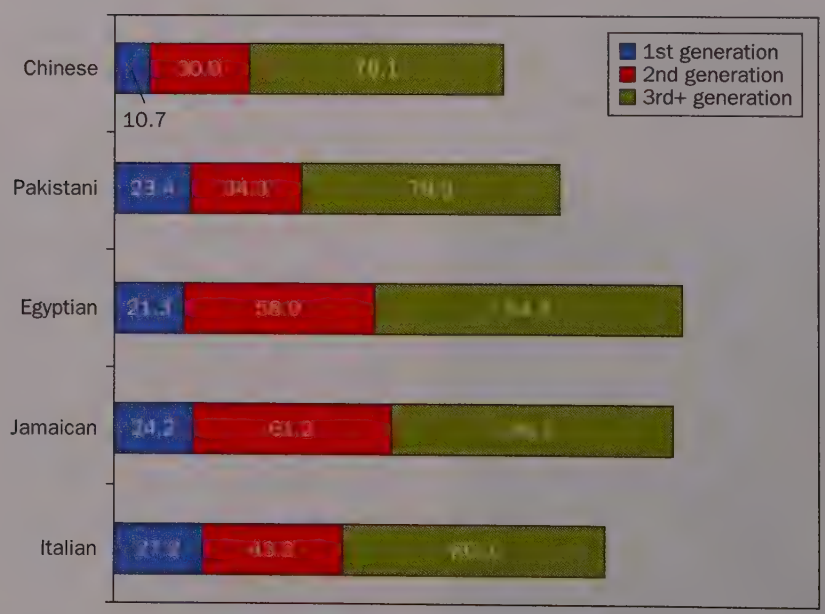
When thinking about families, we often assume that some form of commitment marks the beginning of a relationship. Most often we think of marriage as that form. Inherent in the original Western conceptualization of the nuclear family is the assumption that a heterosexual couple executes a legal contract of marriage.

The only legally recognized type of marriage in Canada is **monogamous marriage**, that is, marriage between two people. To varying degrees, marriages are also **homogamous**, meaning that people have tended to choose marriage partners who are similar to them in ways that are culturally important to them (Knudson, 2018). In Canada, educational homogamy is increasing while ethnic and racial homogamy is decreasing. Over time, marriage partners tend to be more similar in terms of level of educational attainment and less similar in terms of ethnic and racial origin. Couples in mixed ethnic and racial unions comprised 4.6 percent of all married or common law couples in 2011 (Statistics Canada, 2011). Figure 10.4 shows how the proportion of bi-ethnic and bi-racial couples increases as one moves from first- to second- to third-generation Canadians.

Polygamous marriages involve more than two people in a committed relationship. Whereas **polyandry** refers to one woman with multiple husbands, **polygyny** refers to one husband with multiple wives. Polygyny in accordance with Islam is practised in Southeast Asia, West Africa, and the Middle East (Golomski, 2016). However, it is restricted to men who can afford to support a household with multiple wives and many children. While polygynous marriages are illegal in Canada, they have been practised in Bountiful, British Columbia. Winston Blackmore and James Oler, residents of Bountiful and bishops of the Fundamentalist Church of Jesus Christ of Latter-Day Saints, each took multiple wives. In 2018, both men were sentenced to house arrest. Prior to their conviction and sentencing, a judge rejected the men's constitutional challenge that polygamy law infringed on their rights to freedom of religious expression as outlined in the Charter of Rights and Freedoms (*CBC News*, 2018).

Other concepts capture the different ways monogamous marriages are configured, depending

FIGURE 10.4 Multi-Ethnic Canadians, Selected Groups, by Generation (percentage)



The Census asks each Canadian to specify one or more ethnic identities. One's ethnic identity is strongly influenced by the ethnic identity of one's parents. This graph shows the percentage of people in each generation of selected groups who indicated multiple ethnic identities. For example, 21.3 of 1st-generation Egyptian Canadians had multiple ethnic identities, compared to 94.3 percent of 3rd+ generation Egyptian Canadians. In all groups, the overwhelming majority of people think of themselves as multi-ethnic by the 3rd+ generation. This finding indicates a loosening of the ethinc constraint on mate selection over time.

SOURCE: Statistics Canada, 2018c.

on how children are involved and how the marriage relationship ends. **Intact families** are those in which all children are the biological or adopted children of both parents (Kobayashi and Khan, 2018). When marriages end by divorce and one or both former partners form new family relationships including children, they form a **stepfamily**. In a stepfamily, at least one child of one of the partners was born or adopted in a previous union (Vézina, 2012). In 2016, one in ten children between the ages of 0 and 14 years was living in a stepfamily, a proportion that did not change significantly from 2011 (Statistics Canada, 2017d).

LOVE: ROMANTIC AND POLYAMOROUS

You, Me, Her; Shameless; *Wanderlust;* and *Insatiable* are four Netflix shows that directly or indirectly embed a "throuple" or "poly" storyline. Throuples are a type of polyamorous relationship, in which people have "multiple romantic, sexual, and/or affective partners" (Sheff, 2005, p. 252). Polyamory differs from polygamous marriage in that in the former there is no marriage contract. In fact, members of a polyamorous relationship may or may not share a household. An underlying assumption among some people who practice polyamory is that their intimate relationships are based on love—but not necessarily the "one and only" kind (Wolkimor, 2015).

Prior to industrialization, ordinary people often married for economic survival. Among royalty and the aristocracy, marriage motivated by political expedience was also common. The notion that people could form committed unions because of romantic love started to become popular only in the 1700s. Unlike passionate love, which involved mainly sexual intimacy, romantic love was regarded as unconditional and involved intimate relations between a man and woman that ultimately produced children.

The Netflix series *You, Me, Her* is the story of three people in a polyamorous relationship.

SOURCE: © Audience Network/Everett Collection/Canadian Press.

Sociologist Anthony Giddens (1992) has persuasively argued that romantic love is no longer a necessary precondition for intimate relationships. He maintains that, today, people often enter into **pure relationships** based on "confluent love," that is, love that is contingent on reciprocal exchanges of emotional support. Pure relationships also separate sexual relations from reproduction; increasingly, the purpose of sexual intimacy is to experience pleasure, not to make babies. Giddens called this **plastic sexuality**. It is epitomized by people getting together for an evening of "Netflix and chill," and also by polyamory, which is increasingly common and seen as legitimate. Nonetheless, the idea of the "one and only love" is often preserved in ongoing constructions of romantic love. For example, in research on people in polyamorous relationships, Wolkimor (2015) found that some individuals reconstructed and re-imagined the meaning of romantic love so that the special nature of their relationships was not tied to sexual exclusivity or heterosexuality.

TIME FOR REVIEW

1. What are some reasons that the definition of the family has changed from a focus on the composition of the household to a focus on personal, subjective experiences?
2. Why is marriage perhaps one of the best examples of how law matters to the families we have and live in?
3. For what reasons other than love do people engage in intimate partnerships?

THEORIES: THEN AND NOW

Nineteenth-century and early twentieth-century theories of the family focused on the emergence of the modern, nuclear family in the context of sociohistorical change and/or the composition, roles, functions, and interactions of the members of the nuclear family (Gazso and Kobayashi, 2018: 15). Let us now consider these theories in detail.

CONFLICT THEORY

Conflict theory draws attention to the way in which political and economic processes outside families

shape power relations and inequality within them (Mitchell, 2018). Change is attributed to the shift from nomadic, pre-agrarian societies to agrarian, feudal societies to industrialized, capitalist societies. The roots of this approach are in Friedrich Engels's *The Origin of the Family, Private Property, and the State* (Engels, 1884 [2010]).

Engels argued that the traditional nuclear family emerged along with private property and inequalities of wealth. Little inequality existed in pre-agricultural societies. Nomads, hunters and gatherers, cattle owners, and people who merely used small hand tools for planting and harvesting considered land to be common property. A family might graze their cattle or work on a plot of land for generations, but if the plot fell into disuse another family had the right to use it. Substantial inequalities in wealth emerged only when people attached large animals, such as oxen, to plows and it became possible to farm large tracts of land. That was when private property began to be legally recognized, some families began to amass wealth, and men came to enjoy legal control of property and the wealth it generated.

Once legal control of property was concentrated in the hands of a man, wrote Engels, he became concerned about how to pass it on to his children, particularly his sons. He could safely pass on an inheritance only by controlling his wife sexually and economically. Economic control ensured that the man's property would not be squandered and would remain his and his alone. Sexual control, in the form of enforced female monogamy, ensured that his property would be transmitted only to *his* offspring. Engels concluded that only the elimination of private property and the creation of economic equality could bring an end to gender inequality and the traditional nuclear family. Inequality deriving from men's control of private property was the basis of the nuclear family in Engels's view, and the elimination of private property (communism) would spell its end.

FUNCTIONALISM

Functionalism assumes that families contribute to social equilibrium by assigning distinct, complementary roles to family members. Murdock's definition of the nuclear family, quoted earlier, exemplifies this approach. Three functions are mentioned in his definition: economic cooperation, reproduction, and socially approved sexual relations. The performance of these functions helps society to survive and remain stable. Murdock went on accentuate the different but integrative economic roles performed by adult men and women in families.

Talcott Parsons developed this theme. Writing in the mid-twentieth century, he claimed that in the nuclear family, husbands and wives perform gender roles that complement the organization of highly industrialized societies (Parsons and Bales, 1955). Specifically, the role performed by men is "instrumental;" men are the primary earners working outside the home. The role performed by women is "expressive;" women are the nurturers and caregivers working inside the home. According to Parsons, both roles must be performed for society to operate harmoniously, and the division of labour between men and women maximizes efficiency by ensuring that those who are best suited to play each role are in fact allocated to play it.

SYMBOLIC INTERACTIONISM

Often associated with Charles Horton Cooley and George Herbert Mead (among others) symbolic interactionism focuses on individuals' creation of symbolic worlds (through the sharing of meaning) and their interaction with others (through verbal and nonverbal communication) (LaRossa and Reitzes, 2009). Rather than seeing the family as an institution that defines and shapes individual lives, a tendency more prevalent in structural functionalism, emphasis is placed on how individuals make sense of and create their social and family relations. Symbolic interactionism departs from the macro-sociological orientation of conflict and functionalist theories, and focuses instead on micro-sociological interaction *within* the family unit.

W. I. Thomas and Florian Znaniecki's *The Polish Peasant in Europe and America* (1918–20) was a key work in establishing how one could focus on the meaning individuals give to selves and identities in families and family composition as they change, and in relation to broader social change (LaRossa and Reitzes, 2009). Ernest Burgess (1926) also made important, early contributions to this way of thinking about families. He discussed the role of industrialization in changing family life but was more interested in how individuals formed families based on love and companionship rather than law and cultural customs. He maintained that once individuals identify one another as family and engage in family relations, they *are* family and are recognized as such by their communities.

EARLY THEORIES IN HINDSIGHT

The early theories just reviewed were important cornerstones for establishing the study of family as a subdiscipline of sociology. However, they are also now recognized as sexist and ethnocentric. For example, Dorothy Smith (1989) observed that some of these theories had the effect of preserving the desired social order or "ruling relations" of capitalism and perpetuating men's power in the public sphere and authority over women and children in the household. Functionalism in particular valorized heterosexual couple unions and inequality in gender relations (Widmer and Jallinoja, 2008).

Moreover, functionalism was grounded in the experience of white middle-class families in Western industrialized societies. W. E. B. Du Bois was the first black person to graduate with a PhD from Harvard, and he conducted the first major empirical sociological study in North America. His *The Philadelphia Negro* (1899) described in detail the poverty and unemployment facing black families in Philadelphia's seventh ward. He convincingly traced these problems to historical, cultural, and economic conditions, including slavery. Yet his book was virtually ignored by the sociological establishment until the second half of the twentieth century and is only now receiving the recognition it deserves as pathbreaking research (Morris, 2015).

FEMINISM

We can credit feminist scholarship for changing family theory, especially from the mid-1960s on. Feminism in its various forms challenged scholars to rethink the definition of the family as necessarily nuclear and functional by arguing that the study of families should be better grounded in women's practices and experiences (Thompson and Walker, 1995: 856–58). A feminist approach opened up new fields of research, including the study of spousal violence, gender inequality in domestic labour, and diversity of family forms. However, while early feminist theory was significant for its recognition of **patriarchy** (men's power and privilege in the household and public sphere relative to women), it tended to suffer from Eurocentrism and white-centred bias.

Anti-racist feminists later enriched the study of families by examining how colonization, slavery, and systemic racism differentially affect the experiences of non-white and white women (Dua, 1999). It was difficult to persist in the belief that the nuclear family was a universally natural, beneficial, and functional arrangement once it was recognized that the capacity of white middle-class women to perform their "expressive" family role rested on poor and working-class black women neglecting their own families and getting paid to work as paid nannies and housekeepers in white households.

THE LIFE-COURSE PERSPECTIVE

The life-course perspective is increasingly popular in the sociology of the family. It explores the prevalence, timing, and pattern of life events experienced by individuals (e.g., the birth of a child) and related transitions (e.g., parenthood) as they intersect with institutional change experienced by societies (Elder, 1994). The life course of each individual is understood to be influenced by his or her gender, race/ethnicity, class, and network of relations with others, especially kin and other close relations (Marshall and Mueller, 2003). And it is recognized to include intended and unexpected events that often have grave consequences for family life (McDaniel and Bernard, 2011).

TIME FOR REVIEW

1. In what ways did early theories of the family make assumptions that were class- and race-biased?
2. Can you reconcile the claim that families perform useful functions with the diversity of family forms that exist today?
3. In what ways are conflict and feminist theories in agreement? In what ways are they in disagreement?

HISTORICAL FAMILIES, WITH ROSE-COLOURED GLASSES REMOVED

We now turn to an overview of how families have changed over the last century-and-a-half. We contest the notion that change in Canadian families has involved steady, universal improvement. Instead, we show that family lives have been structured by inequalities of gender, race, and class, and differentially experienced by those with and without power.

COLONIALISM

When French and English colonizers settled in what is now Canada, they found Indigenous peoples engaged in hunting, gathering, fishing, and farming. Indigenous

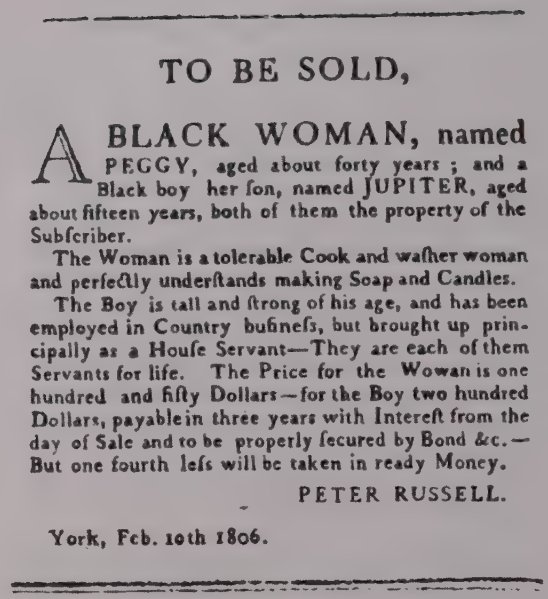
families were characterized by flexibility in committed partnerships, a division of labour between women and men that was not marked by large status or power differentials, and considerable community responsibility for child care (Alook, 2018). Some male settlers took Indigenous women as their wives and established nuclear family structures characterized by strict monogamy, male domination, and responsibility for child rearing residing almost exclusively in the family.

Marriages with Indigenous people were not condoned by the Catholic Church, but it increasingly converted Indigenous spouses, regulated marriages with settlers, and normalized the nuclear family (Alook, 2018; Dua, 1999; Mitchell, 2018). Early colonization transformed Indigenous family life in ways we will examine later (Alook, 2018; Dua, 1999).

To be enslaved is to be owned; slaves lack freedom and bodily rights and are stripped of their humanity (Crichlow, 2018). Slavery was part of Canada's history from the late 1600s to the mid-1800s (Mandell and Momirov, 2005). In 1793, there were over 1000 black slaves in Montreal alone (Reese, 2011). Because white colonizers regarded their slaves as subhuman, they did not concern themselves with slaves' family relationships apart from prohibiting them to marry. Some white residents of the United States remained loyal to the British Crown at the time of the American Revolution and fled to Canada, bringing their slaves with them. Some Canadian residents travelled to the United States to purchase slaves. While some female slaves in Canada did farm work, most were domestics for wealthy urban families. Some acted as "personal attendants" to white women, rarely enjoying privacy (Elgersman, 1999).

Black slaves contributed to white Canadians' prestige and power. They also had a considerable economic effect: because slave labour was extremely cheap, it allowed some white Canadians to magnify their wealth. For example, slave labour was used to build ships in Canada, including ships for the transport of slaves from Africa to North and South America. Whites involved in shipbuilding and in the slave trade profited handsomely.

On a larger scale, 24 million black Africans had been shipped to North and South America by 1800. Half of them died en route because of violence, disease, and shipwreck. But the 12 million who survived greatly enriched white settlers throughout the two continents. Moreover, because much of the economic benefit of slavery flowed back to Europe, slavery contributed substantially to the capital accumulation that allowed the Industrial Revolution to take place (Cooper, 2007; Williams, 1994).



TO BE SOLD,

A BLACK WOMAN, named PEGGY, aged about forty years; and a Black boy her ſon, named JUPITER, aged about fifteen years, both of them the property of the Subſcriber.

The Woman is a tolerable Cook and waſher woman and perfectly underſtands making Soap and Candles.

The Boy is tall and ſtrong of his age, and has been employed in Country buſineſs, but brought up principally as a Houſe Servant—They are each of them Servants for life. The Price for the Woman is one hundred and fifty Dollars—for the Boy two hundred Dollars, payable in three years with Intereſt from the day of Sale and to be properly ſecured by Bond &c.—But one fourth leſs will be taken in ready Money.

PETER RUSSELL.

York, Feb. 10th 1806.

Peter Russell, acting Lieutenant Governor of Upper Canada and the owner of 30 350 hectares of land, was a major slave owner in the late 1700s and early 1800s.

SOURCE: *The Upper Canada Gazette*, Volume XV, Number 45.

The world's first modern social movement was the anti-slavery movement that began in Britain in the 1760s. In 1793, the Upper Canada Abolition Act required that the children of slaves be freed at age 25 (Reese, 2011). Slavery was finally abolished in the British Empire, including Canada, in 1833. In the United States it continued until 1865. Brazil was the last Western country to abolish slavery—in 1888.

INDUSTRIALIZATION

In the pre-industrial, agrarian economy of the eighteenth century, most Canadians lived on family farms. The family was the primary unit of the economy in the sense that all members of the household except small children contributed to production. Some households included non-family members such as domestic servants or hired help (Mitchell, 2018; Tilly and Scott, 1989).

Industrialization involved the development of large-scale, high-volume, commercial agriculture and the proliferation of workshops and factories. People migrated en masse from rural areas to cities. Industrialization coupled with migration and urbanization made it possible for family members to earn a wage and purchase goods and services for consumption. The family ceased to be the primary unit of production

(as on the family farm) and instead became the primary unit of consumption (Tilly and Scott, 1989).

The removal of production from the household brought about the separation of private (domestic) and public spheres of work, with most women working in the private sphere and most men working in the public sphere. Especially in white, middle-class families, women focused on housework and the nurturing and care of their children. Although many black women, including slaves, tried to conform to the "cult of domesticity," either being enslaved inhibited their efforts or economic necessity typically required that they work for a living (Calliste, 2003; hooks, 1981).

The shift in gender roles was ideologically normalized in the nineteenth century. That is, it came to be seen as perfectly "natural" that men were the family's sole breadwinner, earning enough to support the entire family (a "family wage"), while women stayed at home to work without pay, nurturing children and playing a supportive role in charitable and church activities (Mandell and Momirov, 2005). This arrangement did not cede decision-making power in the household to women; men's earning capacity ensured that they were "heads of household."

Variation in the gendered division of labour was based partly on race, as we have seen. In addition, marital status, place of residence, and social class mattered. Many single women worked for a wage, as did widows and women who were deserted by their husbands. If a man could not be the primary earner for his family because of disability, for instance, his wife took on paid work. The clothing industry was a major employer of women in big cities, Montreal in particular. Women worked in factories, workshops, and at home. In the latter case, factories supplied women with raw materials and had them do "piecework;" they were not paid by the hour but by the amount of sewing they did. In the late nineteenth century, it was not uncommon for women in the paid labour force to work 12 or even 16 hours a day (Bradbury, 1994).

Child labour was not outlawed in Canada until the early twentieth century, a change supported by the state's introduction of mandatory education for children. Prior to this, there was more paid work for boys, who worked at a younger age and for higher wages than girls did. Decisions about where and how much boys and girls should work were based on the needs of the family and the structure of the labour market (Bradbury, 1994).

Finally, not all families were welcomed to Canada in the same way. The immigration of Chinese men was encouraged when they were needed to construct the most difficult stretches of the Canada Pacific Railway, over the Rocky Mountains, but they were discouraged from bringing spouses with them. In 1885, the Chinese Head Tax was introduced in British Columbia (Khan, 2018). It deterred Chinese labourers from settling in Canada permanently. The government steadily increased the tax until it passed the 1923 Chinese Immigration Act, which halted all Chinese immigration until 1947 (Crichlow, 2018).

TIME FOR REVIEW

1. How do colonialization and industrialization illustrate the racial inequality that characterized the building of Canada as a nation?
2. How and why were nuclear families a privilege for only some Canadians before and during industrialization?

SINCE WORLD WAR I

WAR

November 11, 2018, marked the 100th anniversary of the end of World War I (1914–18). September 2, 2020, will mark the 75th anniversary of the end of the World War II (1939–45). Many families today were shaped by war. About 1.1 million Canadians served in the armed forces in World War II alone, more than 50 000 of them women. Moreover, when men became soldiers, about 30 000 women started working for pay in factories supporting the war effort. If they had small children, they could take advantage of government-subsidized day care (Canadian War Museum, 2018; *CBC Digital Archives*, 2018).

Economic uncertainty characterized family life following the end of both world wars. World War I directed much Canadian economic production to purposes unsuited to peacetime needs. Adjustment was necessary but time-consuming and costly. At the same time, many families were grieving the loss of sons, fathers, and husbands in the battlefields; 62 000 Canadians and Newfoundlanders were killed in the war. During the Great Depression (1929–39), up to 30 percent of the Canadian labour force was out of work.

Most women who got jobs to help with wartime production during World War II lost them when men returned from the front lines (Canadian War Museum, 2018). We can also imagine several other issues that families had to deal with following

both wars, including renewing couple intimacy, separation and divorce, and dealing with the after-effects of psychological trauma. Since World War II, Canada has welcomed hundreds of thousands of refugees, most recently, 50 000 escaping civil war in Syria. Many arrived without local contacts, without much knowledge of the Canadian way of life, and without a working knowledge of English or French (Government of Canada, 2018). For them, too, war disrupted family life and required significant adjustments.

After World War II, the government offered considerable social and economic support to Canadian families. For example, education and housing grants were made available to soldiers returning from war (Veteran Affairs Canada, 2004). Such supports helped to usher in the "golden age" of the nuclear family.

The Cold War began in 1947. It was a period of escalating political and military tension between the United States and its allies, on the one hand, and the Soviet Union and its allies, on the other. In North America, concern over the nuclear threat, the space race, and the spread of communism were offset in part by a renewed focus on the importance of home, family, and material and emotional stability. The 1950s were a unique pro-family decade. People married in their early 20s and birth rates rose, causing what came to be known as the "baby boom." Rapid economic growth and various forms of government support contributed to the entrenchment of the nuclear family (Fox with Yiu, 2009).

THE WELFARE STATE AND SOCIAL POLICY

The growth of the welfare state since the end of World War II has had huge ramifications for families in Canada. The welfare state is the system of federal and provincial governance that provides security to citizens by redistributing income and organizing and administering social policies and services according to the agenda of the ruling political party (Gazso, 2013). Social policy is the body of programs and services that public authorities undertake to address issues of human health, safety, and well-being (Westhues, 2006: 8). Social policies for families are the programs and services concerned with reproductive health, caregiving for family members, parental leave, family income, and tax exemptions (Baker, 2010). A brief analysis of one family policy illustrates how family members' choices and opportunities are shaped by the social policies of the welfare state.

Social assistance (colloquially, "welfare") refers to provincial, means-tested income support programs of "last resort" for families struggling to make ends meet. Especially since the 1990s, social assistance programs have been reformed so that able-bodied, employable persons must participate in employment programming as a condition of receiving benefits. Lone mothers with young children are understood to be employable once their children are "school ready." They are then required to participate in education and skills upgrading, which means they must pay for child care. However, because subsidies are meagre and child care is expensive, most wind up participating in education and skills upgrading while continuing with their caregiving responsibilities (Ilcan, Oliver, and O'Connor, 2007). In Ontario, lone mothers are even required to do volunteer work to fulfill expectations of employability. One of the contradictions that lone mothers on social assistance face across Canada is that policies stressing the importance of mothers' paid work do not always provide the resources and services needed to support such work.

INDIGENOUS FAMILIES

The post-World War II era continued the practice of racial exclusion. Consider residential schools. The first such schools were introduced in the late eighteenth century, but the last one did not shut down until 1996. Administered on behalf of the church and state, the schools separated children from their families and forced children to be raised in such a way as to assimilate and "civilize" the "savage" (Alook, 2018). The Truth and Reconciliation Commission, a product of a class-action lawsuit against the federal government, recognized the multiplicity of harms that these schools created cross-generationally: sexual and physical abuse, and loss of language, religion, traditional skills, and family.

It is widely recognized that the harms of residential schools affected the ability of survivors to socialize their own children upon reaching adulthood. Unable to pass on traditional norms, values, and behaviours, survivors were often pathologized as unfit parents by the child welfare system. In what became known as the "Sixties Scoop," 20 000 Indigenous children were forcibly removed from their homes in the 1960s and placed in foster homes, typically with white families who lived far from their families of orientation (Alook, 2018).

Indigenous Canadians face many economic, health, and social challenges today because colonial practices did more than forcibly remove hundreds of thousands of children from their families and place them in residential schools and foster homes. Indigenous Canadians were removed from their lands, stripped of their traditional livelihoods, and placed on reserves where their capacity to provide themselves with adequate food and safe drinking water was greatly diminished. Today, many families on reserves confront frequent boil-water advisories, live in substandard housing, and are forced to send their children to high schools in urban areas far from their home communities.

Across all reserves and territories in Canada in 2010, 60 percent of Indigenous children lived in poverty (Macdonaldson and Wilson, 2016). Still today, many Indigenous women are exposed to intimate partner violence. Indigenous women and girls are at a higher risk of going missing, being abused, and murdered; they are 12 times more likely to be harmed than are non-Indigenous women (National Inquiry into Murdered and Missing Indigenous Women and Girls, 2019).

Indigenous families on reserves frequently confront boil-water advisories, live in substandard housing, and are forced to send their children to high schools in urban areas far from their home communities.

SOURCE: © CP PHOTO/Adrian Wyld.

Recent signs of hope include ongoing legal battles and social movements that aim to secure self-government and traditional treaty rights to land—in short, to resist and undo some of the many harms of colonialism. As Indigenous legal experts, social analysts, and ordinary Canadians understand, such an undoing is the basis on which healthy family relations can be built (Alook, 2016: i).

IMMIGRATION

The number of immigrants in Canada has grown considerably since the early 20th century. Before 1967, certain countries were favoured as sources of immigrants—an inherently racist system—but the introduction of the Points-Based Assessment System in 1967 meant that potential immigrants would be assessed on educational skills, knowledge of French or English, and other factors indicating their ability to integrate into Canadian society. Immigration from Asia and, to a lesser degree, the Caribbean region, increased sharply (Khan, 2018).

All members of a family do not necessarily immigrate at the same time. It can take many years for the parents and grandparents of adult immigrants to be allowed to join their children and grandchildren. For family members who seek reunification but find themselves ineligible according to Citizenship and Immigration Canada rules and regulations, engagement in transnational family practices is often the only option to maintaining close family ties. For example, temporary domestic workers, mainly women from the Philippines and the Caribbean region, often live and work in Canada and send money to families back home. Many of these women leave spouses, children and aging parents behind.

PARENTHOOD

A century ago on the family farm, children contributed economically to their families by doing chores. In the absence of anything resembling the modern welfare state and its pension and healthcare benefits, adult children often took care of aging parents. Today, such economic incentives for having children are far less pressing. So why do people have children today?

Gender identity (whether one defines oneself as a woman or a man, or non-binary/gender fluid) and sexuality (heterosexual, homosexual, bisexual, etc.) certainly matter. One's gender identity and sexuality may be enmeshed with the desire to have a child. However, when gender and sexuality do not correspond to heterosexuality and the biological potential to have children, it is also common for people to decide not to give birth. Cultural background, religion, and educational and career ambitions and the capacity to achieve them also shape our choices to have children. Finally, the degree to which the state supports having children is important. In rich countries, the more generous state provisions for day care and parental leave, the greater the likelihood that individuals will have children (Esping-Andersen, 2007).

After World War I, a trend grew toward defining mothering as selfless with respect to time, energy, and money. By the 1980s, such "intensive mothering" was widely considered normal (Bezanson, 2018; Hayes, 1996). **Helicopter parenting** is a term given to an intensive parenting style in which mothers and fathers are perceived to hover over and control many aspects of their children's lives, even into adulthood (Berman, 2018). This style of parenting can inhibit the development of resilience and autonomy in children, becoming especially problematic when college and university students attempt to establish their educational and career paths (Schiffrin et al., 2014).

Fathering has also changed in recent decades. One analysis of news articles traces the emergence of "new fathers" who participate energetically in rearing and caring for their children rather than devoting nearly all their time to earning, which was common in nuclear families in the past (Wall and Arnold, 2007). Another study documents how some men are re-imagining caring for their children in ways often associated with nurturing and caregiving once thought possible only by mothers (Doucet, 2018). Other researchers have studied "progressive gay fathers" who entirely dissociate child-rearing and child-care roles and duties from gender (Schacher, Auerbach, and Silverstein, 2005). Still others have researched parenting among LGBTI2SA individuals and people who raise gender non-conforming children (Berman, 2018).

The routes to parenthood for these parenting pioneers are diverse and include surrogacy, adoption, artificial insemination, known donor, and raising children from a previous relationship. Many of these same routes to parenthood are shared by heterosexual individuals, as are the decisions to parent. Parenting pioneers, however, are particularly likely to parent in ways that resist the normalization of heteronormative family life and work to ensure that their children feel socially included in family and community life. Some people think that parenting in ways that are not heteronormative is harmful to children, but little evidence supports this contention (Biblarz and Stacey, 2010).

We now turn to the important issue of gender differences in unpaid and paid work.

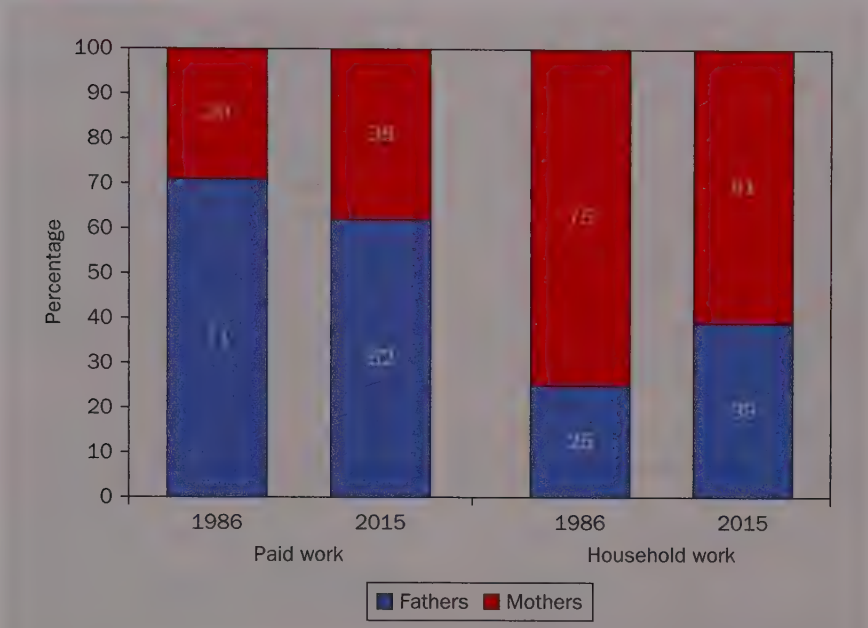
PAID AND UNPAID WORK

Some 82 percent of Canadian women worked for pay in 2015, compared to just over 65 percent in 1983 and fewer than 22 percent in 1950. Women whose youngest child is under the age of 6 increased their employment rate by more than 37 percentage points between 1976 and 2017 (Moyser, 2017). In 2012, women worked more than 33 hours per week on average compared to just under 40 hours per week on average for men (Stalker, 2018).

Gender inequality in the distribution of occupations and pay is glaringly evident. Men tend to occupy supervisory or administrative positions, jobs that are characterized by high pay and status. Women tend to occupy positions in a lower pay bracket (Wilson, 2005). More women than men work part-time, often because they take on more responsibility for child care. In most provinces, women still tend to work fewer hours for pay than do men (Moyser, 2017). High day-care fees don't help. Licensed day care for a 16-month-old infant costs up to $21 600 a year in Toronto, for example. The pay cheque of many women would barely cover that cost, making it pointless for them to join the paid labour force. Women's paid labour force participation rate is higher in Quebec than elsewhere in Canada precisely because Quebec alone enjoys a universal, low-fee day-care program.

The influence of the male earner/female caregiver ideology on paid and unpaid work is evident from Figure 10.5. Canadian fathers did 25 percent of household work in 1986 and 39 percent in 2015—an increase of 14 percentage points. Canadian mothers did 71 percent of household work in 1986

FIGURE 10.5 Percentage Distribution of the Total Number of Hours of Paid Work and Unpaid Household Work Done by Parents, by Sex, 1986 and 2015



SOURCE: Houle, Turcott, and Wente (2017: 4).

and 62 percent in 2015—a decline of 9 percentage points. Over the same period, paid work for fathers decreased by 9 percentage points and increased for mothers by 14 percentage points. So mothers continue to do more domestic work than do fathers, while fathers continue to do more paid work than mothers do, although the differences are declining. Still, the presence of young children in the household decreases the amount of time mothers spend doing paid work but has little effect on the amount of time fathers spend doing paid work (Moyser, 2017).

For same-sex families, the division of household labour appears to be more equally shared (Sullivan, 2004). One study compared the division of domestic labour among lesbian, gay, and heterosexual couples who adopted children. It found that lesbian and gay couples shared domestic labour more than heterosexual couples did. Contrary to some other studies, it found that lesbian couples were not better at sharing than gay couples were. It also discovered that specialization in areas of unpaid work occurred in each type of family (Goldberg, Smith, and Perry-Jenkins, 2014). Another study surveyed 225 gay and straight dual-earner couples. It found that among gay couples, common household tasks such as child care, laundry, grocery shopping, and yard work were divided more equally than among straight couples (Schulte, 2015).

The experience of men and women in the labour market is directly connected to the economic well-being of the entire household. Over the past two decades, income inequality has been growing in Canada. Wealth is becoming increasingly concentrated among the wealthiest 10 percent of the country's families, while the bottom 10 percent have more debt than assets (Broadbent Institute, 2014). Canadians involved in precarious work (work that is contracted, part-time, temporary, low paid, and without benefits) are among, or close to, the bottom 10 percent.

Precarious work is performed mostly by women and racialized workers, which is why underemployment, unemployment, and income insecurity are more likely to affect racialized and Indigenous families in Canada than non-racialized and non-Indigenous families (Bezanson, 2018). In Canada, one in five racialized families lives in poverty compared to one in 20 non-racialized families (Broadbent Institute, 2012). The families most likely to have incomes below the poverty

Critical Sociology TORONTO CHILD POVERTY DIVIDED ALONG RACIAL LINES

Toronto remains the child poverty capital of Canada, with more than one in four kids living in low-income families, says a new report based on the 2016 census.

Children from racialized families—or families of people of colour—are more than twice as likely to be living in poverty as those from non-racialized families, or 23.3 percent compared to 11.4 percent, says the report. And about 84 percent of Toronto's Indigenous families with children are living in poverty.

When it comes to newcomer families—many of whom are also racialized—almost half of Toronto region children whose parents arrived in Canada within the past five years live in poverty.

Critical Thinking Questions

1. Considering all you have read, how is child poverty in lone mother-headed families connected to mothers' paid work experience and their past intimate relationships?
2. What historical experiences in Canada can help explain the perpetuation of low income for Indigenous families?

SOURCE: Excerpt from Laurie Monsebraaten. (2017). "Toronto child poverty divided along racial lines." *Toronto Star*, 15 November 2017.

line include racialized, recent immigrant, Indigenous, and lone mother-headed families (Government of Canada, 2017). Among all children in Canada, one in five experienced poverty in 2010 (Macdonaldson and Wilson, 2016) (see Critical Sociology: Toronto Child Poverty Divided along Racial Lines).

TIME FOR REVIEW

1. How are contemporary practices of family life for Indigenous peoples still haunted by colonial processes of the past?
2. How are the choices and practices of parenthood connected to the paid and unpaid work experiences of women and men?
3. In what ways do novel approaches to parenthood that resist heteronormativity and gendered roles suggest that the process of parenthood is both stable and innovative?

CONCLUSION

In this chapter, we have analyzed continuity and innovation in the meanings, practices, and processes of families in Canada. In reviewing trends in family life over time, discussing classical and popular theory, and exploring the historical experiences of families in Canada and their contemporary implications, we have uncovered the meanings ascribed to family and emergent ideas and definitions of family.

In doing so, we have called attention to how families are diverse in form and function with regard to race/ethnicity, gender, sexuality, class, ability, and citizenship. Despite this diversity, we maintain that all families still share the same collective goals of loving, caring, and providing for all their members. Clearly, there is continuity in the face of innovation.

SUMMARY

1. **Of all the definitions of family we have reviewed, which one(s) best reflect(s) how we personally assign the meaning of "family" to those whom we care about and who care for us?**
   Newer definitions of the family that move beyond assumptions of household composition are most fitting in capturing perceptions of "What family is to me." They encourage us to identify the expectations we have of others and how meeting these expectations allow us to see them as family. They ask us to consider how our relations, such as those of interdependence, shift over time as we and our family members age, and yet continue to account for our sense of being part of a family. The definition of family

as simply those with whom one feels close creates an inclusive picture of family that includes fictive kin.

2. **What three trends suggest that family lives are different than in the past?**
The decrease in the number of children born, the growth of same-sex families, and the increasing numbers of people choosing to cohabitate rather than marry, are three trends that highlight how contemporary family lives are different than those in industrializing society.

3. **What are three family practices that persist in the midst of change in Canadian families?**
Although the meaning assigned to marriage has changed (e.g., people may marry another person of the opposite or same sex) and fewer people are marrying, marriage nonetheless persists as an important transition to family life. Caring for people with whom we are close and with whom we are interdependent persists; whether children are in lone-parent or two-parent households, or even multigenerational households, the act of caring remains a powerful dynamic of family life. Finally, socialization of children, or preparing children to become active members of society through the teaching of norms and values, is still practised.

When we remove our rose-coloured glasses and consider "the family" as interconnected with race and citizenship—and law and policy—what do we learn about the institution of family over time in Canada?

We learn that the social construct of family, especially as institutionalized in law and policy, has always been a construct created through the inclusion of some and the exclusion of others. For example, Indigenous Canadians had their own family relationships profoundly altered with colonization, to fit the image of "what is" and "what should be" family according to European cultural norms. Also, immigration policy has a long history of implicitly conveying to some non-white immigrants that their family practices were/are not wanted or had/have to be constrained/changed.

QUESTIONS TO CONSIDER

1. Traditionally, families have been defined by their constituent parts. For example, the nuclear family is traditionally said to consist of a husband, a wife, and at least one child. In contrast, we have defined families in terms of the social processes that take place in them. What are the strengths and weaknesses of each type of definition? In particular, which type of definition is more inclusive of the wide variety of family types that exist today?
2. Theories may differ from one another partly because they try to answer different questions. We reviewed five major theories of the family. How do they differ from one another in terms of the questions they try to answer?
3. Historically, the Canadian state has legally recognized some types as families but not others. Certain rights have accompanied legal recognition. Which types of families has the Canadian state failed to recognize historically? What rights have been denied to these families?

GLOSSARY

Boomerang kids (p. 222) are adult children who return home after leaving, often for financial or personal reasons.

A **census family** (p. 222) is defined by Statistics Canada as married and common-law couples, same-sex or opposite-sex, with or without children, and lone-parent families.

An **extended family** (p. 225) includes kin beyond the nuclear family, including grandparents, aunts, uncles, and cousins.

A **family of orientation** (p. 225) is the family in which one grows up.

A **family of procreation** (p. 225) is the family created by two people when they have a child.

Fictive kin (p. 225) are people with whom one has a close relationship and are perceived as family but do not involve marriage, procreation, or adoption.

Gender identity (p. 234) is how one defines oneself as a woman, man, or non-binary/gender fluid.

In **helicopter parenting**, (p. 234) parents hover over and control many aspects of children's—including adult children's—lives.

A **homogamous marriage is** (p. 226) one in which marriage partners are culturally similar.

Intact families are (p. 227) families in which all children are the biological or adopted children of both parents.

Kin (p. 225) are people who are related to each other by blood, marriage, or adoption.

A **monogamous marriage** (p. 226) is a legally sanctioned marriage between two people.

A **multigenerational family** (p. 225) includes kin in addition to nuclear family members.

A **nuclear family** (p. 225) comprises either a husband, a wife, and one or more children, or two parents and their child or children.

Patriarchy (p. 229) is the affording of economic power and privilege to men in the public sphere of paid work and the private realm or household.

Plastic sexuality (p. 227) is the practice of sexual intimacy for pleasure and recreation.

Polyamory (p. 224) is the practice of having intimate relationships with multiple partners.

Polyandry (p. 226) refers to the marriage of one woman to multiple husbands.

Polygamous marriages (p. 226) involve three or more people.

Polygyny (p. 226) is the marriage of one man to multiple wives.

Pure relationships (p. 227) are entered into on the basis of partners having their needs and desires met.

The **replacement rate** (p. 222) is the number of live births per 1000 women in a population that must occur for the size of the population to remain constant over time (ignoring immigration and emigration).

A **stepfamily** (p. 227) exists when at least one child of one of two partners was born or adopted in a previous union.

CHAPTER 11

EDUCATION

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Analyze how schools help to socialize students, affect the system of social stratification, and are socially organized.
- Summarize the main theories used by sociologists of education.
- Describe how social forces have shaped modern schooling.
- Understand how and why modern societies have to some degree become disenchanted with schooling.

INTRODUCTION

Go to the education section in any bookstore and you will see rows of titles declaring schools to be in crisis: *The Catastrophe in Public Education*, *Public Education: An Autopsy*, *Failing Our Kids: How We Are Ruining Our Public Schools*, *The University in Ruins*, and so on. Newspapers decry the quality of schooling with headlines like "Johnny Can't Read and He's in University." Such drama! Is it really that bad?

Not if you consider several facts about schools. Until quite recently, higher education was deemed to be a waste for common people. Early in the twentieth century, most people did not complete high school. But the past half-century has brought a change in attitude. In Canada and elsewhere, advanced levels of education are seen to be not only suitable but also necessary for many people. Over the past 60 years, high-school attendance has become almost universal, and attaining a secondary-school diploma the norm. University enrolments have never been higher. Further, public opinion surveys show that most Canadians rate our public schools and universities favourably and believe they are effective teachers of our youth (Abacus Data, 2017; Hart and Kempf, 2018).

These facts highlight a key paradox. Modern schooling has been a success story in many respects, having grown immensely, reshaped the lives of most Canadians, and received billions in government funds. Yet as schools become more central to society, they attract more and more criticism. This chapter will illuminate this paradox by exploring the transformation and changing connections between schools and Canadian society over the past century.

HOW SCHOOLS CONNECT TO SOCIETY: CLASSICAL AND CONTEMPORARY APPROACHES

Sociologists examine three main ways that schools connect to society. First, schools shape society by **selection**. Education systems channel students into different types of schools and programs. This process creates stratification when programs are designated as "higher level" or "lower level" and link to better or worse job opportunities. The endless grading, judging, marking, and testing in schools sorts and certifies students with different badges of ability. This may seem self-evident; we have all written hundreds of tests in our lives. But a sociological approach sets this process within a bigger picture:

Schools *select* students to go into different programs and, eventually, they wind up in different occupations in a stratified social order. Schools *socialize* students into the ways of their society's culture and schools help to *organize* society socially.

SOURCE: © Layla Mashkoor.

Schooling connects to societal-level inequality. In a society marked by disparities in wealth and income, where more people go to school for longer periods, never before has the pursuit of educational credentials been as consequential for income, occupational success, and other life-chances. Sociologists ask *who* is selected for *what*, and *why?*

These kinds of questions can be traced back to the ideas of Karl Marx and the structural functionalists. Although Marx wrote little on schooling, his followers examined the role of schooling in maintaining patterns of economic inequality. They have argued that schools are stratified in ways that reflect workplace hierarchies, with basic forms of schooling teaching youth to be punctual and compliant, and higher levels encouraging students to internalize orders and the expectations of authority figures. In contrast, structural functionalists see school selection as an increasingly meritorious process in which the brightest and hardest-working are identified, rewarded, and selected for training in professional work and high-level management.

Second, schools shape society as they *socialize* people. They help prepare new adults, passing along values and knowledge. This too may seem glaringly obvious, but decisions on *which* values and knowledge are passed on can be contentious. When Émile Durkheim (1961 [1925]) was writing, industrialization and the rise of democracy promoted individualism, and people began to feel free to develop their talents to their fullest extent. As individualism flourished, Durkheim sought to understand how modern societies could replace the binding and authoritative voice of religion, which had traditionally prescribed norms to guide people's thoughts and actions. What would now keep individuals from being self-centred and acting only in their own interest? Durkheim cared deeply about moral education, the normative element of schooling that he hoped would become society's prime tool to combat the rising culture of individualism.

When Canada was more religious, schools imparted old-fashioned virtues and moral codes. But society has changed, so contemporary sociologists now ask these questions: Do schools still impart a clear set of values? Is socialization better understood as a series of unintended consequences that are beyond anyone's control? Just how successful are schools at socializing students? Do they treat everyone the same or does school socialization differ by class, gender, and race?

Third, education shapes society through *social organization*. Schools affect how we learn and help define different types of occupations. This was a core interest of another classical theorist, Max Weber, who was fascinated by "rationalization," supposedly the main "logic" of modern societies, embodied in bureaucratic organizations. For him, modern schooling was changing society by teaching knowledge in a systematic fashion and creating credentials to forge more formal pathways to labour markets. Why do employers seek and hire employees with school credentials? The conventional wisdom is that schools teach skills, employers hire the most skilled, and school credentials are signals of skills. But Weber's contemporary followers have questioned whether the school–labour market connection is so simple. They contend that most school content is only loosely connected to what is demanded in most jobs. They see schools as largely serving to distribute legitimate access to jobs.

Let us now examine in depth each of the three roles of education: selection, socialization, and social organization.

SELECTION

When Canada was an agricultural society, land was a prime economic resource, and affluent families strove to pass their property to their children. When manufacturing and commerce became the key economic activities, children could inherit business assets. But today, most youth earn their living through employment and they need credentials. "Class reproduction," the passing of advantage from one generation to the next, does not operate through direct inheritance in education. No one can inherit his or her parents' law degree, medical licence, MBA., or teaching certificate. These things must be earned. Now that most positions of power and status require some sort of school credentials, how do the affluent pass on their advantages?

School selection occurs in two ways. First, schooling itself is structured in a stratified manner, although this structuring takes different forms across countries and over time. Second, within that structure, students from different backgrounds have unequal rates of success. Families navigate their way through this structure, searching for ways to boost their children's educational success for the most prized credentials. In Canada today, parents expect their children to receive a postsecondary education (Statistics Canada, 2002).

CHANGING SCHOOL STRUCTURE

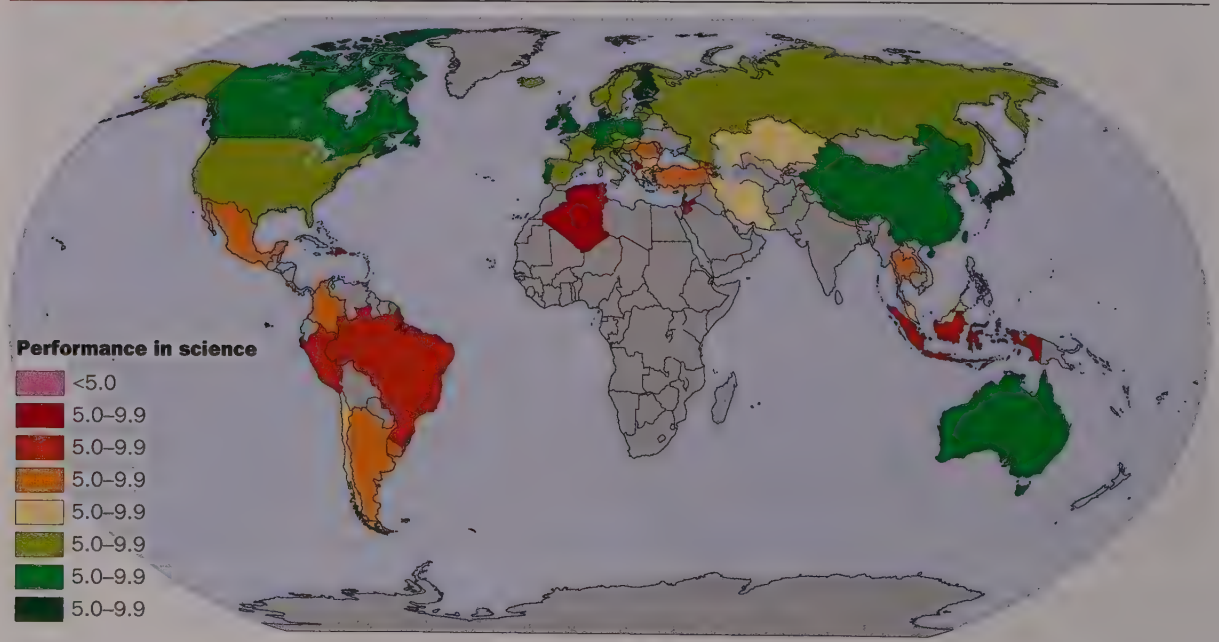
In Canada, the traditional form of educational selection is known as "streaming." Streaming consists of splitting students into curricular groupings, typically one bound for postsecondary schooling, one headed for general training. Students in the upper tier are exposed to advanced mathematics and works of literature, while those in the lower tier focus on the rudiments of literacy, numeracy, and practical workplace skills. Although Canada ranks near the top of the world in reading and science literacy (see Figure 11.1), most Canadian sociologists have long criticized streaming for limiting educational opportunity, particularly for students from working-class backgrounds. Streaming is seen to dampen their aspirations, manage their ambitions, and discourage them from moving on (Clandfield et al., 2014).

As in Canada, European policymakers want more youth to study in university, claiming that more graduates will generate wealth and improve their nation's economic competitiveness (Wolf, 2002). Most European nations are removing barriers, creating more alternative channels for youth, and moving toward a more streamlined contest model. As a result, the form that inequality takes in education is changing. As more youth enter higher education, competition shifts to higher levels, and stratification *within* universities and colleges becomes increasingly important.

Higher education can be seen as stratified along two main dimensions: selectivity of institution and field of study (Davies and Guppy, 1997). Universities and colleges with the best reputations offer their graduates access to elite jobs, higher wages, contacts, and other advantages. In some countries, higher education institutions differ greatly in prestige. In Europe, ancient universities, such as Oxford, Cambridge, and the Sorbonne, have highly exclusive student bodies, and they more readily provide their students with access to elite positions. In Canada, universities are generally selective and academically intensive than are community colleges, whose vocational mandates give them a subordinate position within higher education (Pizarro Milian and Davidson, 2018).

Compared with that in many European countries, Canadian education has been relatively open and flexible. For decades, schools in Britain, France, and Germany sorted students into entirely academic or entirely vocational schools at relatively young ages (Kerckhoff, 2002). European academic secondary schools were oriented to preparing elites and preserving a heritage of classic literature, philosophy, and rigorous exams. Excellence was equated with high culture. Until recently it was inconceivable for French

FIGURE 11.1 Pisa 2015 Results for Performance in Science



SOURCE: Based on data from OECD (2018), PISA 2015 Results in Focus at http://geostata.com/pisa-2015-results.

Fields linked to powerful professions such as medicine, law, engineering, and business, offer students pathways to lucrative job markets.

SOURCE: © Flamingo Images/Shutterstock.

secondary-school students to study "practical" electives, such as business or accounting. Stratification was rigid; once students entered a type of school, few moved out. If students failed an examination at age 15 or 16, they were effectively eliminated from further higher education.

To understand national differences, sociologists distinguish **sponsored mobility**, which takes place in educational systems that select relatively few youth early in their lives to enter elite universities, from **contest mobility**, which takes place in educational systems that group the bulk of youth into the same school, expose them to the same curriculum, and send large numbers to higher education (Turner, 1960). Sponsored mobility uses highly structured streaming to restrict access to higher education, while contest mobility promotes more competition within a unitary structure. Canada is an example of a contest system, while many European countries have had sponsored systems.

For most of the twentieth century, Canadian schooling did not sharply separate a "gifted" minority from the rest by creating separate schools. Academic curricula were instead given to almost everyone. From the 1960s until recently, proportionately more Canadian youth flowed into Canadian universities than European youth flowed into European universities, and even lower streams were not strongly vocational; little high-school content has been directly job-related in any stream. As a result, the high-school diploma lacks vocational meaning, and it does not guarantee any particular skill for any specific occupation. Canadian high schools channel many students to postsecondary levels and prepare few for any particular job.

Fields of study also differ in prestige, selectivity, access to resources, and payoffs for graduates. High prestige was once attached to humanistic fields such as philosophy and English that enjoyed elite patrons, but in recent decades this has changed. Fields linked to powerful professions or commercial markets, such as medicine, law, engineering, and business, have now gained the upper hand. These fields offer students pathways to lucrative job markets (Frenette and Frank, 2016).

As colleges and universities are flooded with an unprecedented number of applicants, school selection moves upward to higher education. Students in different institutions and fields face unequal prospects. Universities and colleges sort these larger masses for vastly different occupational and social opportunities. Since there are simply not enough high-paying jobs for all graduates, entry into the most advantageous slots in higher education is becoming increasingly valuable. Required high-school grades—the prime currency for entrance to universities—have steadily risen over the past decade. Many universities are boosting their entrance standards and tuition fees, gaining repute not only by admitting top students but also by rejecting large numbers of qualified students. Institutions that were already highly exclusive are increasingly selective, while the less discriminating are expanding their enrolments.

The degree of stratification in higher education differs across nations. For instance, the American system is a mix of private-sector and public institutions that are arrayed on a steep prestige hierarchy. American higher education has famous Ivy League universities, elite liberal arts colleges, and flagship public universities that greatly overshadow less-renowned institutions. This steep, entrenched system makes the names of elite institutions important to employers.

Canadian higher education, in comparison, not only lacks a private sector but also lacks a steep institutional hierarchy (Davies and Zarifa, 2012). Until recently, Canadian governments have allowed only publicly funded universities. The resources allocated to these institutions have been fairly proportional to their size, while their American counterparts are much more unequal. Although the top American colleges and universities select from a national and international pool of applicants, only small numbers of Canadian undergraduates cross provincial or territorial borders, and most commute to their local institution. Canada has a relatively small national market for undergraduate credentials. Although degrees from

top-ranked colleges in the United States can offer great opportunities there, few employers in Canada value the name of any one Canadian university over others.

Accordingly, Americans have long ranked their universities, but the practice is relatively new in Canada. The best-known Canadian rankings are compiled by *Maclean's* magazine. The magazine gives high scores to institutions with such attributes as large libraries, incoming students with top high-school grades, faculty with research awards, and small classes. Although popular, this ranking has been criticized for using questionable measures and for creating an artificial image of hierarchy and competition among our universities. However, university administrators take them seriously and strive to improve their relative position. In 2018, the top three "primarily undergraduate" universities according to *Maclean's* were Mount Allison University (Sackville, New Brunswick), the University of Victoria British Columbia (Prince George, British Columbia), and Trent University (Peterborough, Ontario). The top "comprehensive" universities were Simon Fraser University (Burnaby, British Columbia), the University of Victoria (Victoria, British Columbia), and the University of Waterloo (Waterloo, Ontario). The top three "medical/doctoral" universities were McGill University (Montreal, Quebec), the University of Toronto (Toronto, Ontario), and the University of British Columbia (Vancouver, British Columbia) (*Maclean's*, 2018).

Canada may be developing a more pronounced hierarchy in higher education. As our universities and colleges increasingly generate more of their own revenue, whether via large external research grants, corporate funds, alumni donations, or steeper tuition, some universities and colleges will likely enjoy advantages. If wealthier institutions are perceived by students and employers to offer a superior education, it may bring a steeper pecking order to Canadian higher education (see Davies, Maldonado, and Zarifa, 2014).

TIME FOR REVIEW

1. Why has modern schooling expanded over the past century?
2. In what ways has expansion necessitated a greater variety of accommodations among educators?
3. What social pressures are generated by rising demands for postsecondary credentials?

INEQUALITY AMONG STUDENTS

Within sociology, a debate has raged since the 1960s over whether schools create equal opportunity. Functionalists believed that schools were increasingly rewarding the best, allowing bright students, regardless of social background, to enter high-paying professional and managerial positions. In contrast, neo-Marxists contended that the very design of mass public schooling ensured that people who are born disadvantaged remain disadvantaged. In recent years, this claim has been extended to race and gender, with many analysts arguing that female students and those who are members of minority groups are treated poorly in school and are given little choice but to enter low-paying jobs in female and minority group "job ghettos." The claim here is that schools worsen existing inequalities by stereotyping disadvantaged youth, devaluing their cultures and skills, and steering them into lower streams. Sociologists have conducted research on this topic for decades. This research has consistently uncovered the following patterns.

First, educational attainment for youth from all class backgrounds has steadily risen over the past half-century. As Table 11.1 shows, more Canadians from all walks of life attend school for more years than did their fathers. Second, despite this expansion, student success has been found to be consistently related to socioeconomic background. This has been true not only across time but also around the world, and, indeed, it is one of the "iron laws" in the sociology of education. Youth from less advantaged backgrounds are repeatedly overrepresented in lower streams, get lower grades, drop out of school at higher rates, and are underrepresented in higher education. Inequalities along socioeconomic lines were evident when such data were first collected and they have persisted ever since (Anisef, 1974; Blossfeld and Shavit, 1993; De Broucker and Lavallée, 1998; Gamoran, 2001; Knighton, 2002; Krahn, 2004; Porter, Porter, and Blishen, 1982; Ryan and Adams, 1999; Wanner, 2000).

To illustrate these inequalities, Table 11.1 shows the proportion of Canadians who were 21 years old in 2006 who had ever attended a postsecondary institution. The top row of Table 11.1 shows that 74.7 percent of Canadians of that age had attended a university, community college, or CEGEP. However, this percentage differs for different levels of parental schooling. For example, the likelihood of someone attaining a university degree was 24.3 percent if

TABLE 11.1 Postsecondary Participation of 21-Year-Old Canadians (Percentage)

	ATTENDED A POSTSECONDARY INSTITUTION	ATTENDED COMMUNITY COLLEGE OR CEGEP	ATTENDED UNIVERSITY
All Canadians	74.7	33.0	41.7
Family income			
Below $50 000	66.2	34.8	31.4
$50 000+	79.0	32.1	46.9
Indigenous status			
Indigenous	51.1	28.0	23.1
Non-Indigenous	75.4	33.2	42.2
Parents' education			
No postsecondary	60.9	36.6	24.3
Some postsecondary	80.7	31.5	49.2
Immigration status			
First generation	86.6	29.6	57.0
Second generation	83.0	30.0	53.0
Nonimmigrant	71.2	34.2	37.0

SOURCE: Adapted from Statistics Canada data in McMullen (2011).

neither parent had any postsecondary education, but it rose to 49.2 percent if at least one parent had a postsecondary education. We see a clear socioeconomic effect in Table 11.1—the likelihood of attaining a university degree more than doubles across levels of parental education. These findings are typical of dozens of studies on this topic.

However, a different picture emerges when we compare the school success of males and females. Males once had a virtual monopoly on higher education, but this imbalance began to change in the late 1950s. By the 1980s, more women than men were attending university. Females now drop out of high school in fewer numbers, graduate more often, enter universities in greater numbers, and score higher on many standardized tests (DiPrete and Buchmann, 2013). Today, women have surpassed men on most measures of educational attainment.

What explains this reversal? It partly reflects the success of the women's movement; partly the entry of women into traditionally male-dominated professions, such as law and medicine; and partly how some "female-dominated" occupations, such as teaching, nursing, and social work, not only grew but also demanded higher-level educational certificates. Men's attainment has not kept pace, partly because substantial numbers of men continue to work in blue-collar jobs, such as mining and construction, which rarely require postsecondary schooling (Ferrao, 2010).

Although more women are going to university, they often enter different fields from their male counterparts. Table 11.2 shows the distribution of university graduates by field of study in 2013. While most students in Canadian universities are female, women do not form the majority in fields that are related to math, computer science, or engineering. Of course, these numbers are *very* different from those of previous eras. For instance, in the early 1960s, about 25 percent of university graduates were women; in some fields, such as forestry, no women graduated, and several others, such as law, had only a handful of female graduates (Statistics Canada, 2001). But while this pattern has certainly altered, and while such fields as business, law, and medicine have seen dramatic change, women continue to be underrepresented in several dynamic and well-paying fields (DiPrete and Buchmann, 2013).

Patterns of educational attainment by immigration status show that on average, second- and especially first-generation immigrants exceed nonimmigrants in postsecondary participation, particularly in attending

TABLE 11.2 Undergraduate Degrees by Field of Study, Year, and Gender

	1961–62			1992			2013		
	TOTAL DEGREES	DEGREES TO WOMEN		TOTAL DEGREES	DEGREES TO WOMEN		TOTAL DEGREES	DEGREES TO WOMEN	
FIELD OF STUDY	NUMBER	NUMBER	%	NUMBER	NUMBER	%	NUMBER	NUMBER	%
Agriculture	351	9	2.6	549	261	47.5	690	453	48.9
Architecture	102	3	2.9	609	225	36.9	1 434	768	53.6
Arts	9 205	3 140	34.1	40 995	25 029	61.1	64 149	42 234	65.8
Commerce	1 144	52	4.5	15 510	7 428	47.9	41.250	21 348	51.8
Dentistry	229	8	3.5	507	192	37.9	372	213	57.3
Education	3 650	1 403	38.4	17 976	13 236	73.6	19 221	13 707	71.3
Engineering	2 437	4	0.2	7 389	1 026	13.9	13 986	2 628	18.8
Fine/Applied Arts	93	65	69.9	5 598	3 657	65.3	8 904	5 895	66.2
Forestry	110	0	0.0	705	225	31.9	2 094	1 251	59.7
Household Science	303	303	100.0	1 104	1 020	92.4	3 603	3 081	85.5
Law	661	37	5.6	3 579	1 842	51.5	3 510	2 007	57.2
Medicine	846	86	10.2	1 887	831	44.0	1 962	1 221	62.2
Nursing	366	365	99.7	2 844	2 715	95.5	10 908	9 837	90.2
Pharmacy	275	77	28.0	774	498	64.3	1 338	840	62.8
Science	1 904	310	16.3	13 224	5 613	42.4	19 938	9 993	50.1
Social Work	163	112	68.7	2 016	1 674	83.0	4 512	3 816	84.6
Veterinary Medicine	72	3	4.2	285	177	62.1	324	258	79.6
Non-Classified	877	260	29.6	5 088	3 036	59.7	9 408	5 994	63.7
TOTAL	**22 788**	**6 237**	**27.4**	**120 639**	**68 685**	**56.9**	**207 840**	**125 544**	**60.4**
IQV*		0.70			0.85			0.88	

*IQV, the Index of Qualitative Variation, shows how evenly women are distributed among fields of study. If the same number of women were in each field of study, IQV would equal 1.00. If all women were in one field of study, IQV would equal 0. Here we see an increase in IQV over time.

SOURCE: Compiled by Neil Guppy using data from Statistics Canada, *Education in Canada* (1973, 2000, 2013), Cat. No 81-229; www.statcan.gc.ca/bsolc/olc-cel/olc-cel?lang=eng&catno=81-229-X. Custom tabulations from Statistics Canada database "Classification of Instructional Programs."

university (refer back to Table 11.1). Meanwhile, Indigenous people have a much lower participation rate in postsecondary education and university attendance than do non-Indigenous people. Other data show that Indigenous, black, and Hispanic Canadians have lower-than-average participation rates (Davies and Guppy, 2018). What accounts for these variations? An explanation must take three legacies into account: differences in socioeconomic status, colonization, and immigration policy.

The large variation among minority groups is partly a product of Canada's changed immigration policy. Whereas recruitment in previous eras targeted Europeans with relatively low levels of schooling, since the late 1960s, Canada has targeted Asians with advanced educational credentials. As a result, living conditions

for immigrants have varied widely. Some of them have entered the country with profiles that typically promote educational success—high levels of parental education, comfortable incomes, urban residences—while others have not. Thus, Canada's educational rankings partly reflect the "inputs" from the immigration system as well as its own internal processes. Meanwhile, Indigenous people are products of colonialism, segregation, and discrimination, which render them the most impoverished ethnic group in Canada.

These patterns of attainment raise a key question: Do schools lessen inequalities in society, maintain them, or make them worse? This question is difficult to settle empirically because almost everyone goes to school. If there were some groups or regions where youth didn't go to school, then researchers could see whether education worsens or improves rates of inequality. For something that resembles these conditions, sociologists have looked to the time of the year in which few students are in school: summer. This research has long been done in the United States and has been conducted more recently in Canada (Alexander, Entwisle, and Steffel Olson, 2007; Burkam et al., 2004; Davies and Aurini, 2013; Downey, von Hippel, and Broh, 2004). Its basic logic is this: If schools gave superior treatment to middle-class children, then student learning gaps (as measured by standardized test scores) would grow over the school year and would either stagnate or shrink during the summer months. Alternatively, if such gaps grow in the summer and narrow during the school year, then schools probably do not disadvantage youth of lower socioeconomic standing and may even mitigate the effects of home and neighbourhood. This research is almost unanimous in its basic conclusion: Schooling *reduces* learning gaps along socioeconomic lines, while learning gaps widen in the summer when students are not in school. Researchers conclude that schools indeed function as equalizers, at least in terms of measured learning.

The mountain of research on school inequalities thus lends support to a more nuanced position. Schools can be seen as progressive institutions that offer opportunities for all youth but are limited in their power to eliminate inequalities. Contemporary schools have enjoyed some success in reducing inequality, but they have not come close to totally eliminating such disparities. Affluent children have many more advantages and fare better in school because of their advantaged home environments.

TIME FOR REVIEW

1. What are the main patterns of unequal school attainments by class, gender, and race in Canada?
2. In what ways are schools active generators of inequalities, and in what ways do they partially compensate for disparities generated in the larger society?

SOCIALIZATION

Contemporary sociologists offer different depictions of how schools socialize their students. According to structural-functionalist theory (Dreeben, 1967), schools teach modern values. As societies industrialize, urbanize, and become more cosmopolitan, schools provide a common culture to compensate for the declining influence of religion. Schools are said to transmit such values as universalism (which involves treating everyone as equal, rights-bearing individuals) and meritocracy (a system in which social rewards go to people with talent who exert effort in open competitions). But rather than teaching these new values overtly, the functionalists contend that schools teach them a **hidden curriculum**. Teachers do not repeatedly lecture students on universalism and meritocracy but instead teach these values by running schools in a universalistic and meritocratic fashion—students learn by doing. By treating all students equally according to common rules, schools are seen to embody the values of universalism, and by rewarding deserving students, they are seen to teach the value of meritocracy. Thus, modern schools teach core values by virtue of their very structure and practice.

Other sociologists see a darker side to school socialization. For instance, Marxists also claim that schools impose a hidden curriculum—but one that promotes obedience to authority, not cheery modern values (Bowles and Gintis, 1976). They contend that public education is structured to support capitalism by creating a disciplined labour force. By organizing student learning in a competitive manner and having students vie for grades and rewards, schools are said to mirror capitalist competition and individualism. Likewise, feminists and many students of race claim that schools impose subordinate identities on their students. (This argument is elaborated below.)

To assess these theories, it is useful to think of school socialization as a continuum. At one extreme are boarding schools, where the institution regulates virtually all facets of life—not only lessons but also how and when students sleep, eat, dress, and play. The

school becomes the student's entire social universe, resembling what sociologists call a *total institution*, an all-controlling organization that remakes people's identities, where people are isolated from the larger society and are strictly controlled by a specialized staff. In boarding schools, teachers become powerful socializing agents, forging identities and having an almost singular impact on how pupils speak, look, and act. At the other extreme of the continuum is online education. If a person's education consists solely of online courses taken at home, the school's position in that person's life can be marginal, something that merely appears on a computer screen, to be ignored at will. School becomes just one socializing force among many, like a television program that can be turned on or off.

Most Canadian students experience school socialization somewhere between these extremes. Few attend boarding schools or take only online courses from home. Most attend public schools full-time, Monday to Friday. Bearing this reality in mind, we next explore how schools socialize students, contrasting the ways socialization in schools has changed over the past 150 years. We then consider the ways in which schools treat different groups of students differently.

Functionalists claim that schools teach universalism and meritocracy, while Marxists assert that schools impose obedience to authority.

SOURCE: © Michal Kowalski/Shutterstock.

CHANGING FORMS OF MORAL EDUCATION

The history of Canadian schools is one of declining religious influence and altered moral content. Canadian public schools were originally organized by churches, with Roman Catholics being granted separate schools in Ontario, and Protestants being granted separate schools in Quebec. Similar denomination-based arrangements were made in all provinces. In the mid-nineteenth century, few people questioned the proclaimed need for public schools to provide Christian teaching. The earliest schools were nominally secular, but their religious character was overt.

Egerton Ryerson, the father of public schooling in what is now Ontario, wanted schools to create literate, religious, and devoted citizens. He and other school promoters believed that religious schooling could curb an array of perceived problems, such as the rising incidence of youth crime and general ignorance (Prentice, 1977: 128). Christianity occupied a central place in public school missions for a century. Even in the 1950s, public authorities demanded strong religious influence in public schooling, with some calling for public schools to teach "cardinal virtues" and "Christian ideals" (Government of Ontario, 1950: 36–37).

By the late 1960s, educators had very different ideas. Fewer educators saw their role as passing on religiously inspired wisdom, time-honoured truths, and a sense of moral duty. Instead, school socialization was to become more individualistic. Educators increasingly sought new ways of teaching for a new age. Consider this quotation from a 1968 provincial committee report:

> Learning by its very nature is a personal matter. There is virtually a metabolism of learning which is as unique to the individual as the metabolism of digestion. Parents and teachers may create conditions with learning in mind, but the actual learning experience is intimate and subjective, for each human

> being reaches out to the world in his own idiosyncratic way. (Ontario Department of Education, 1968: 49)

After the late 1960s, schools saw their role less as providing moral guidance and more as creating forums for thinking about moral issues. This created a different type of moral education, at least in emerging theories of pedagogy. Students were to be exposed to a fuller range of contemporary controversies, beliefs, and ideals than before. Teachers aimed to enable students to make informed choices, rather than have them accept moral edicts. Ideals from Christianity were replaced by ideals of critical thinking, science, and multiculturalism. Educators wanted less to tell students what was unambiguously true or false and more to nurture a deeper understanding of various subject matters, based on discovery rather than repetition. More educators saw their mission as taking a critical stance toward society, exposing injustices, and questioning established interpretations of history (Hurn, 1993: 191).

What has been the impact of these changing ideals? Although both functionalist and Marxist theories can be compelling, what do empirical studies tell us about *actual* socialization in current schools?

In partial support of functionalist theory, schooling does appear to make people more "progressive," in the sense of supporting civil liberties, tolerating minorities, appreciating social justice and ethnic diversity, and embracing nontraditional roles for women (Kingston et al., 2003; Pallas, 2000). However, schools do so in a relatively neutral and individualized manner, and they offer rather ambiguous moral messages. That is, although students are encouraged to identify with various progressive causes, such as protecting the environment, helping the homeless, fighting racism, and fundraising for overseas children, schools do this by having students relate their own experience and venture their own opinions.

Classrooms increasingly have "feel-good" posters that exhort children to read and stay in school, a form of "bumper-sticker morality" containing catch phrases for quick consumption rather than deep discussion and reflection. Yet, in support of Marxist theory, schools spend most of their time on mundane matters of personal conduct, striving to get students to be orderly and task-oriented. Much of teachers' time is spent on urging students to be respectful of one another, to participate in class, and to be cooperative (e.g., Brint, Contreras, and Matthews, 2001; Jackson, Boostrom, and Hansen, 1998).

Although studies tend to support elements of both functionalist and Marxist theory, they also suggest that modes of shaping students are changing. Teachers now treat students in a more indulgent fashion than in previous eras. They see self-esteem as essential for learning and control their classes with a lighter touch than in the past. They increasingly rely on "token economies," giving small rewards to get children to comply, rather than using overt authority. They use group projects, not just individual assignments, and especially in elementary schools, students work in rotating activity centres, freely moving around the classroom and choosing their tasks. Today's schools are making less use of classic styles of enforcing obedience. Further, teachers try to inspire *all* students. Whereas schools in the past would give up on those students deemed hopeless, whether too poor, too troubled, or too slow, today's schools work hard to engage the entire student body, even the least able performers. Indeed, the law demands that schools do so.

In some respects, the socializing power of Canadian education weakens as students progress from elementary and secondary to postsecondary levels. As Mullen (2010) notes, research comparing commuters to students who reside on campus concludes that university life has a far greater impact on the values, attitudes, and psychological growth of the latter. This is especially the case for students at elite universities in the United States. However, in Canada, most college and university students are commuters. They attend classes for 10 to 15 hours per week, so are not immersed in an intensive, all-encompassing educational environment. Further, Canadian higher

The diversification of Canadian society has influenced the way morality is taught in school.

SOURCE: © Wavebreak Media Ltd/Alamy.

education institutions are not arrayed on a steep prestige hierarchy, and so are less likely to breed social elites that are relatively homogeneous and cohesive, as American Ivy League colleges and England's Oxford and Cambridge do. Nevertheless, Canadian higher education influences students in more subtle ways by reshaping their social networks (Lehmann, 2014; Stevens, Armstrong, and Arum, 2008). Higher education can greatly alter the number, quality, and type of social ties students enjoy, and thereby influence their subsequent job, choice of marriage partner(s), and lifestyle opportunities.

To summarize, the morality taught in public schools has shifted from religious indoctrination to a more individualized and indulgent approach that encourages students to learn by reflecting, not reciting. This change reflects the diversification of Canadian society, where moral reference points are numerous and where stakeholders want schools to address social problems while not preaching a monolithic doctrine. Within this secular and individualized form of education, do schools treat everyone the same? That is the question to which we now turn.

CREATING IDENTITIES? GENDER AND RACE

Historically, Canadian education prepared girls and boys for different roles in adult society. Traditional school systems were premised on the notion that most young women should be homemakers or schooled for a narrow range of "nurturing" occupations, such as nursing and elementary-school teaching. Although boys and girls were mostly grouped together at lower ages, they were often segregated at older ages with the expectation that a select few boys would move to advanced studies (Prentice, 1977: 111–12; for a partly dissenting view, see Gidney and Millar, 2012). Although both sexes attended school, their experiences were dissimilar.

Few people challenged gender traditionalism until the 1960s. Women's educational attainment has changed since then, first matching and now outpacing male attainment in most areas. But despite this change, some critics accuse schools of continuing to reinforce traditional gender roles (Sadker and Zittleman, 2009). They claim that a hidden curriculum continues to quietly subordinate women, prepare them for a gendered division of labour, and send messages about their inferiority. The explicit gender stereotyping of the late nineteenth century has only been masked, they argue. They support their argument by pointing to several indicators beyond standard measures of school attainment.

First, feminist critics examine the top levels of school staffing, noting that despite much change, males may be overrepresented in some positions of power. While teaching positions in lower grades are held almost entirely by women, many positions in higher education and in administration are held by men. A second claim of gender bias pertains to curriculum. For several decades, feminists have charged school textbooks with being loaded with sexist language, illustrations that depict most active characters as male, and stories that depict women in nurturing occupations and as stay-at-home moms. They also contend that high-school literature courses ignore female authors and that history textbooks disregard the contributions of women. Here there has been change, especially as most provincial governments have curriculum guidelines that monitor gender representation in most course material.

A third claim of gender inequity is the fact that schools continue to tolerate the conduct of male students that, in today's world, is now considered to be sexual harassment. Feminist critics decry "hostile hallways" in which sexual comments, touching, jokes, and leers are deemed "normal" and "natural" and are therefore tacitly permitted. Schools are said to accept such behaviour when they rationalize such acts as "boys being boys." Such rationalizations are linked to inequities in extracurricular programs. Schools continue to be accused of considering it natural that men's sports teams should receive higher priority and more funding than women's teams do, an imbalance said to send a message of female inferiority. Finally, teachers stand accused of treating female students unfairly, sometimes ignoring them in favour of boys (this particular accusation has been controversial, since research suggests teachers give males more attention only for disciplinary reasons). The sum total of these inequities, it is argued, is a gendered "hidden curriculum" that alienates females from course material, dampens their aspirations, and ultimately reinforces gender inequality.

Similarly, some analysts argue that Canadian schools sometimes socialize minority students into racial identities. The historical episode of residential schools for Indigenous children is the most blatant. In the nineteenth and twentieth centuries, the Canadian government set out to mould Indigenous identities by sending up to half of all Indigenous children to these

schools with the intent of making them "modern Indians" who would speak English or French, convert to Christianity, and learn skills for menial jobs. The residential school was a total institution that separated Indigenous children from their families and communities, interrupted the rhythms of their home lives, and implanted more regimented cultural norms. The legacy of this racism is felt in Indigenous communities to this day. Likewise, young black children in some cases were singled out for discriminatory treatment in the nineteenth and early twentieth century, labelled as "coloured," and segregated in black-only schools (Axelrod, 1997: 79).

Since the 1980s, Canadian schools have responded to such problems in two ways. First, they have reworked curricula to make them more multicultural and inclusive of minority groups. Policymakers have overseen the rewriting of history and literature textbooks to better represent images of immigrants and racial minorities, and have introduced measures to encourage students to be more accepting of certain forms of diversity. For multiculturalists, schools should also cultivate cosmopolitan citizens who identify more deeply with the global community and with concerns for peace, ecological health, and the developing world's advancement, and see themselves not only as national citizens but also as members of the human race, with obligations to all people everywhere.

Although overt segregation laws have been long removed, and although multicultural curricula have been adopted in a variety of forms, some activists continue to charge Canadian schools with being insensitive to the needs of youth from some minority groups (Dei, 2005). Schools, they contend, "racialize" children from some minority groups by making them feel "different." In this view, schools actively reinforce racial identities and inequalities. Students from some minority groups are seen to be ill-treated by "colour-blind" policies that ignore their particular disadvantages.

Partly in response to these changes, Canadian schools have attempted to accommodate minorities in a second and more controversial fashion: through greater school choice. "School choice" refers to the use of public funds that give parents more discretion in their children's education. It usually entails making available to parents a wider variety of educational options beyond a standard, local public school.

Each province has developed its own mix of support for religious and linguistic minority schools. On these grounds, the Toronto District School Board has created a few "black-focus" schools as part of its broad menu of school choice. These schools have received much attention over the past several years from educators and the public, not only because race is a hot-button issue in Canadian education, but also because they signal a key debate about school socialization. Underlying these schools is a more pluralist vision of nation building than currently exists.

Some activists embrace Justin Trudeau's image of Canada as a "post-national" state, as a community of communities in which schools should play a vital role in its construction. From this activist point of view, students' ethnicity, race, religion, and gender mediate their relationships to the national community, and so separate schools or programs are needed to socialize minority groups into their own culture, whether defined by race, language, or religion. For opponents, however, pluralist schooling segregates students. Opponents favour multicultural education as a means of integrating all groups into society. At present, insufficient evidence exists to help settle this debate.

Schools on First Nations reserves are getting a lot of attention these days in the wake of the Truth and Reconciliation Commission. Many Indigenous leaders are trying to balance their requests for more federal government funds with their desire to ensure that their schools remain autonomous and promote their cultures and languages. These debates over reserve schools should not deflect attention from the fact that most self-identified Indigenous people now live off-reserve, often in major urban centres. Consequently, their future educational advancement will occur largely in public schools. To this end, provincial ministries and school boards are developing Indigenous-sensitive pedagogies and curricula.

In recent years, perhaps no "equity category" has attracted as much attention as sexuality and gender. Many people urge schools to recognize gay, lesbian, transgendered, and questioning youth and respond to any instances in which they are stigmatized, bullied, and harassed. Others, especially some religious conservatives, refuse to recognize sexual minorities. Educators thus face twin pressures to recognize and overlook student sexuality.

Sexual diversity is now institutionalized in human rights codes, workplace equity guidelines, and anti-discrimination policies. However, its recognition in schools still faces several roadblocks. For starters, sexual minorities are difficult to identify in

schools, since they still face much risk by becoming visible. No other group has a comparable fear of being "outed." Further, since most youth are not sexually active until high school, younger students may be unsure about their sexual identity. Nor is students' sexual orientation officially recorded in school records, unlike student gender, age, or disability status. Sexual minorities are not a clinical population, unlike some mental health or criminal categories. Nonetheless, given ongoing evidence of bullying and harassment, school policies for sexual minorities are being developed in the form of teacher awareness training, new curricular material, revised codes of conduct, and specially tailored programs. In some respects, these curricular revisions echo those for gender in the 1970s and 1980s, and for race and multiculturalism in the 1990s (see Critical Sociology: Equity Categories and Equity Policy).

Critical Sociology EQUITY CATEGORIES AND EQUITY POLICY

How do equity concerns make their way into school policies? One way is through the social categories by which education officials "see" students, count their enrolment, collect data, and tailor curricula to them.

Sociologists characterize groups' economic conditions (class), social expressions of biological sex (gender), ancestry (ethnicity and race), and so on. These characteristics have much social currency and a taken-for-granted quality that can capture real social divides in people's life-chances and experience. Ask someone to identify their gender or race, and most people can quickly give a definitive answer. Asking about their social class is more complicated. Most people claim to be "middle class" regardless of their income and wealth. Most people nonetheless seem to "see" economic class fairly accurately, perhaps more accurately in others than in themselves.

Canadian schools have long sorted students by religion, language, and perceived ability, reasoning that each category is either part of a distinct community and/or cannot be educated by standard methods. However, many educators today are invoking the term *equity* to call for new reforms to Canadian schools. The term is not precise, but it is often used when people call for schools to recognize and address unique needs among different social categories of children. Equity categories are not static. Old ones are sometimes discarded if they are seen to be stigmatizing, as has happened with older special-education labels. New categories can emerge through a two-step process.

In step one, new equity categories enter schools under pressure from social movements and political parties. These actors see public schools as crucial shapers of children's life-chances. They spotlight ill-treated groups, such as sexual minorities and students with mental health needs. They exercise organizational tactics ranging from protests to media campaigns, petitioning, lobbying, and writing about schools. They sometimes make schooling seem like a battleground.

In step two, previously contentious categories become widely accepted and taken for granted. New equity categories become uncontroversial because pressure is applied from the outside by politicians, from the inside by students, teachers, and parents, and from outsiders who become insiders, as new teachers and students bring with them new understandings of school goals and professional responsibility. Through these channels, new equity categories can take root. For instance, a Gay/Straight Alliance may initially be established through protests, lobbying efforts, media campaigns, and petitioning. However, after much pressure has been applied to change the culture of schooling, Gay/Straight Alliances may be widely adopted across many locales with relatively little effort because they are recognized as legitimate.

Once institutionalized, policies get reshaped by school routines. Most large school boards now hire credentialed specialists who interpret and enforce equity policies. Their efforts make formerly contentious equity categories seem normal and old terms appear stigmatizing. Think of a variety of shifts in terminology over the past few decades: from "coloured person" to "person of colour" to "race" to "racialized minority"; from "sex" to "gender;" from "homosexual" to "gay and lesbian" to "LGBQ" to "LGBTQ"; and from "Indian and Eskimo" to "Indigenous and First Nations" to "FNMI" (First Nations, Métis, and Inuit) to "Indigenous." These shifting terms mark the space where contentious politics gets codified into standardized procedures.

Critical Thinking Questions

1. Can faith-based schools retain their religious mandates while also providing equity to sexual minorities? If so, what organizational strategies might they use?
2. Is special education more equitable now than it was in past? If so, how?

THE LIMITS OF SCHOOL SOCIALIZATION

Although claims that schools mould gender and racial identities are popular, one difficulty is that they assume schools have a great deal of socializing power, rather than providing convincing evidence of their effects. It is conceivable that some educational institutions, such as residential boarding schools, may wield great socializing power, but the average public school today is more limited in its reach. We need to recognize other socializing influences. Students clearly are influenced by forces well beyond the school—their families, neighbourhoods, workplaces, the mass media, and, of course, peer groups (Paulle, 2013).

Sociologists have long examined high-school peer groups, believing they set limits on schools' socializing sway, and how varying degrees of student autonomy may *hinder* school goals. Sociologists in the 1950s and 1960s became interested in peer cultures when they found student populations to be less deferential than in previous decades. Although most school deviance was mild, consisting of irreverence, apathy, or truancy, it still subverted educational goals by disrupting classrooms and interrupting learning. James Coleman (1961) argued that, among adolescent peers, learning and achievement mattered less than popularity and looking good. Moreover, in the peer group, being a top student did little for a person's reputation. Coleman's ideas have since spawned a large body of research on the formation of student subcultures. This research has examined how the very structure of schooling encourages youth to respond in ways that can frustrate the socializing efforts of educators (Coleman, 1961; Tanner, 2009).

Specifically, over the decades, sociologists have interpreted youth's obsession with physical appearance, hairstyles, clothing brands, and cliques as no mere by-product of their relative immaturity. Instead, sociologists see them as responses to particular social conditions. Schools segregate youth by age, give youth little power, and require their attendance by law. Yet students do have some degree of autonomy. High school is not overly challenging for most youth. Most students have some disposable income. These conditions, sociologists argue, encourage youth to be status-conscious.

Status groups emerge when social structures offer few alternative avenues for social mobility. Students become a status group because they lack power and authority but have enough autonomy to invent their own social realm within schools. By this logic, Murray Milner, Jr. (2004) has likened high-school cliques to Indian castes. Castes emerged in traditional India when there was little democracy or economic mobility for people of low social rank. Upper castes obsessed about appearance, social ranking, and maintaining social distance from inferiors. They created elaborate rituals and pressures for conformity, especially for intimacies such as eating and romantic relationships.

So how are high-school cliques like castes? According to Milner, teens risk social demotion if they are seen eating with or dating someone with low status. They use small cruelties and put-downs to uphold their dominance. A jock pesters a nerd to maintain his own status at the nerd's expense. Status also explains why some teens are so concerned with conforming to brand-name clothing fashions. The isolated world of high school creates pressure for cliques to display their status through consumer commodities. Since teens are largely excluded from "producer" roles in prestigious workplaces but are freely granted "consumer" roles, the latter become their main source of reputation.

Sociologists have also traced a second, more antagonistic element of student subcultures to schools' very own selection function (Cohen, 1955; Stinchcombe, 1964). In this view, since schools reward only some students and deem others to be academically unfit, they create disincentives for unsuccessful students. Low-ranked students suffer an inglorious status and get labelled as "underachievers" and channelled into streams that lead neither to postsecondary education nor to useful job-training programs. These students suffer emotional injury in schools and hunger for a more positive self-image. Accordingly, low-achieving students form anti-school subcultures as an alternative source of social recognition. These subcultures invert the values that schools try to promote, rejecting students who are rule-abiding, obedient, and hardworking, and celebrating the rule-breaker, the insolent, and the hedonist. Among males, this rebellion is epitomized by confrontations with teachers, fighting, smoking, drinking, and sexual bravado. Among females, it is marked by a flaunting of their sexuality and a preoccupation with dating. In both cases, subcultures are seen to be a youthful expression of frustration with school selection processes that thwart upward mobility.

Since the 1980s, sociologists have argued that oppositional subcultures can also take racialized forms. Fordham and Ogbu (1986) claim that African

Americans criticize their high-achieving peers for "acting white," that is, for adopting the culture and language of white America and being disloyal to their own community. Such pressures are said to discourage black students from identifying with schooling.

The "acting white" thesis has become influential, but is it true? Several American sociologists have put it to the test, but most cast doubt on it. Some suggest that only a small portion of black students take oppositional stances to schools (Downey and Ainsworth-Darnell, 2002). Others argue that generic peer pressures are felt by *all* high-achieving students, regardless of race, and those who earn top grades are similarly labelled geeks, nerds, or brainiacs. Only in schools where student achievement is starkly unequal by race, they speculate, will this pressure take a racial form (Tyson, Darity, and Castellino, 2005).

Studies of peer groups suggest that school selection provokes at least a mild form of antagonism from lower-achieving students and that this can frustrate the efforts of educators. However, the very existence of oppositional subcultures similarly suggests that some theories may exaggerate the extent to which schools mould gender and race identities. Students learn roles in their neighbourhoods, families, media, and places of employment (which can be highly segregated), and these are competing sources of socialization that may be partly counteracted by schools.

For instance, some sociologists (DiPrete and Buchmann, 2013) contend that peer groups, not school officials, divert female students toward established gender roles and discourage educational advancement. Some suggest that embracing a student role may actually erode gender traditionalism. In a field study of an English secondary school, Lynn Davies (1984) found that youth in university-bound streams were relatively more "androgynous" and less conforming to gender stereotypes. In contrast, girls who were about to drop out looked forward to motherhood rather than to careers, and would-be male dropouts were more traditionally masculine. Since new career opportunities for academically oriented males and females may weaken traditional conceptions of gender, it is not clear that schools continue to enforce gendered and racial identities. Although schools sometimes treated females and minority students differently in the past, contemporary research shows that public schools promote more liberal and progressive views about gender and race. And schools have long been among the few places in society where boys and girls are grouped together to perform the same role.

These findings force us to think more about the *limits* of schools' socializing role. Paradoxically, as more people go to school for more years, the socializing impact of schooling may become *weaker*. More than in any previous era, schools now compete with other socializing agents. More youth are employed part-time, popular culture is everywhere, and today's parents are spending more time on developmental activities, hiring more tutors, and purchasing more extracurricular lessons for their children (Quirke, 2006; Sayer, Bianchi, and Robinson, 2004). Schools are losing their monopoly on structured lessons and developmental activities, at least among the middle class. The upshot is that their unique impact on students may be on the wane. Rather than being a total institution, schools are moving toward the weaker end of the socializing continuum, no longer imparting a cohesive ideology and now competing with more socializing agents than before.

TIME FOR REVIEW

1. In what ways has socialization through education changed over the past century?
2. In what ways are today's pedagogical philosophies more indulgent and less punitive than the pedagogical philosophies of previous eras?
3. What socializing agents compete with schools in contemporary societies?

SOCIAL ORGANIZATION

For Weber, modern schooling reflected the emergence of a rationalized worldview in the organizational form of bureaucracy. With schools being one of Canada's largest expenditures, costing over $60 billion per year, they need to be seen as legitimate organizations that generate useful skills in a relatively efficient manner. Contemporary theorists offer widely differing accounts of whether schools are indeed efficiency-seeking organizations. Some see schools as converging with Weber's ideal type of bureaucracy; others do not.

THEORIES OF SCHOOL ORGANIZATION

The most straightforward account is offered by economists. **Human capital theory** asserts that the school's role is primarily economic: to generate

needed job skills. The theory assumes that both individuals and governments "invest" their time and dollars in schools because they believe it will lead to prosperity. The costs of schooling—books, buildings, teacher salaries—are "inputs," and student learning is the "output" or product. Human capital theorists see schools as organized to maximize student skills. If the value of the output exceeds its cost, schooling becomes a worthwhile investment, such as when individuals' expenditures in schooling early in their life eventually raise their earnings or improve their health. Schooling is thus seen as a form of capital—*human* capital—since people cannot be separated from their knowledge and skills in the same way that they can be distinguished from their financial and physical assets (Becker, 1964).

Indeed, research consistently shows that education *does* pay. On average, people with more years of schooling earn higher wages and have better employment rates (Walters, 2004). School pays, but why? Although some analysts point directly to the skills that are generated through education, many sociologists question the extent to which schooling improves useful job-related skills and whether jobs use what schools teach.

"Credentialists" like Randall Collins (1979) are generally skeptical of human capital theory for at least two reasons. First, usually far fewer high-skilled jobs are available than there are graduates from high schools, colleges, and universities. Employees are often overqualified; available jobs often do not require their learned skills (Livingstone, 1998). Second, Collins sees weak connections between school content and the workplace. Much schooling—hours of essay writing, studying quadratic equations and periodic tables, practising the tuba—has little to do with most job realities. School curricula develop according to their own dynamics, he argues, and seldom in response to employers' demands. Further, employers rarely bother to look at student grades when hiring. With the exception of a few professions, merely possessing a diploma, certificate, or degree will suffice. If school content were really connected tightly to the job market, Collins reasons, employers would surely use grades as vital indicators of a candidate's suitability. So why do employers seek graduates with credentials if little of their learning actually connects to job demands? Collins offers several answers.

One is **credential inflation**. Just as monetary inflation devalues money, modern education devalues credentials. Just as a dollar cannot purchase the same goods it could 50 years ago, a high-school diploma does not lead to the same job it did 50 years ago. Inflation results from intense competition in the labour market. When hiring, managers in large corporations and in government are often flooded with job applicants. The sheer number of candidates makes careful and personal consideration of each one impossible. Hence, managers need a bureaucratic screening device, a procedure to reduce the applicant pool that is seen to be fair and efficient. Over the past few decades, employers have increasingly used credentials for this purpose, even for jobs that are not complex or demanding. Hiring someone with credentials may not reflect a need for specific skills. Seeking a leg up on competitors, people comply by obtaining an educational credential. This inflation creates a growing gap between the competencies required in jobs and the level of education possessed by job occupants.

Another reason that employers seek graduates with credentials concerns **professionalization**. Professional associations, such as the Canadian Medical Association, control occupational standards by setting the educational requirements for their profession. By demanding higher levels of education, these occupations can limit the number of eligible competitors. Over the decades, many occupations have raised entry requirements—school teachers, nurses, accountants, and social workers, to name a few. Sociologists see this as part of a process of professionalization in which an occupation tries to raise its standing and command higher wages. Think of all the requirements that didn't exist 50 years ago: MSW, MBA, BN, and so on. What fascinates Collins is that teaching, nursing, social work, and business easily survived in past generations without demanding these credentials, and little evidence suggests that the tasks of these occupations have become so much more complex as to necessitate these elevated school requirements.

Collins also contends that some employers prefer to hire employees with advanced credentials simply for their prestige. According to Collins, many employers hire university graduates for jobs to gain trust from clients and customers. Firms want to appear serious, businesslike, and trustworthy and not "fly-by-night." For Collins, well-educated employees are the human equivalent of a nice piece of office furniture: They signal that the firm is honourable. Advertising a workforce with many letters trailing their names (BA, BSc,

LLB, MBA, MA, PhD, etc.) can be a mark of status in a world where business transactions can be highly uncertain and in which clients seek signals of high repute.

Is credential inflation widespread in Canada? If so, has it produced any side effects? Some professors contend that massive credential inflation has indeed occurred and that it has triggered a downward spiral of grade inflation and student apathy. In two influential books, *Ivory Tower Blues* (2007) and *Lowering Higher Education* (2011), sociologists James Côté and Anton Allahar presented data suggesting that large proportions of undergraduates—perhaps 40 percent—are largely disengaged from course material, barely exert effort, gain little academic skill, and yet earn As and Bs. In the past, the authors argue, fewer students coasted through universities, and those that did earned a mere "Gentleman's C." Today's campus administrators, they contend, tolerate the new situation as long as students continue to pay much-coveted tuition dollars. Meanwhile, professors and students have worked out an implicit "disengagement pact": Professors dole out inflated grades in exchange for being left alone to conduct research; disengaged students agree to enrol in uninspiring courses as long as they receive decent grades. According to Côté and Allahar, this situation has created a crisis of legitimacy, raising questions of universities' integrity.

The initial public reception of these ideas in 2006 was mixed. Supporters championed them as a fearless exposé of higher education's dirty secret. Critics contended that they exaggerated problems, romanticized students of yesteryear, and failed to consider that perhaps today's students prefer new forms of instruction over older methods like lectures and textbooks.

Since Côté and Allahar initially wrote, new controversies over the quality of higher education have arisen. In 2011, two American sociologists found that almost half of all students showed little growth in academic skill despite attending university for two full years (Arum and Roksa, 2011). In 2016, Jordan Peterson, professor of Psychology at the University of Toronto and best-selling author, amassed a huge following on YouTube in part by criticizing what he decried as low-quality research and teaching in universities, particularly in the humanities and social sciences. In 2018, a trio of writers managed to publish several spoof studies in seemingly serious academic journals. Each of these incidents sparked public discussion over the integrity of higher education.

Despite these controversies, Canada's universities do not appear to have lost any legitimacy, at least as suggested by their bottom lines. Universities continue to have healthy enrolments, attracting hundreds of thousands of students, including rising numbers from around the globe. Private fundraising campaigns easily raise many millions of dollars. Employers continue to prefer university graduates over candidates without degrees. Universities thus appear to have not only weathered repeated storms of criticism, but have even thrived. How? Perhaps this resiliency can be traced to their core resource: a monopoly on credentials that are widely recognized with currency across a range of job markets. Until their credentials are no longer valued in society, universities will enjoy a deep pool of legitimacy.

SCHOOL AUTHORITY: FROM TRADITION TO RATIONALITY TO MARKETS?

Premodern schools were typically small and informal, and educational authority was decentralized. Canada had thousands of school boards, most of which controlled only a few small schools. Each teacher had little formal training and enjoyed wide discretion over his or her classroom. Lessons were taught without many formal guidelines. There was little large-scale planning and there were few educational laws. Teachers had parental-like authority over students. They could discipline largely as they pleased, often resorting to corporal punishment, with little fear of reprisal. Curricula were justified in terms of passing on time-honoured doctrine and cultural traditions. Teachers were proclaimed to be moral trustees of society.

All this changed during the twentieth century. In Weber's terms, modern institutions like schools were rationalized. Public education was justified less in moral terms and more by its social utility. Canadian schools cut "irrelevant" subjects like ancient languages and adopted new ones, usually justified in terms of their necessity for daily living. Teachers were seen less as trustees of the common good and more as semi-professionals with skills and responsibilities.

Rationalization was accompanied by a change in organizational form. Schools grew and looked less like little red houses and more like office buildings. They were increasingly governed by general rules. Lines of control were formalized from top to bottom, with hierarchical chains of command and clearly defined responsibilities. Regulations delegated authority

to credentialed officials in a more specialized division of labour, particularly at upper-grade levels. Personnel were selected for their advanced training rather than for personal ties to highly ranked officials. Public schools hired certified teachers with university diplomas. Curricula were standardized, approved by higher-ranking bodies, and arranged in uniform age-graded levels. Modern schools became bureaucracies.

After World War II, governments across Canada saw education as increasingly necessary for prosperity and the development of the citizenry. Consequently, they gave public high schools a new mandate: to retain as many youth for as many years as possible. Seeing only a few students as suitable for advanced education became passé. A new norm emerged: Virtually everyone ought to complete high school. Those who did not were to be deemed either deviant or proof of a failing system. The big challenge for schools was how to translate these new ideals into new realities.

The expanded mission for schooling transformed secondary schools within a generation. School officials interpreted their mandate as delivering a broadly comparable education to all students. They further standardized schooling, from physical plant, to teacher training, to curricula. Authority and power were increasingly wielded in distant hierarchies rather than in local communities, an approach that has been dubbed, somewhat derisively, as the "one best system" (Tyack, 1974), faulted for being indifferent to the needs of individual pupils. Critics commonly portrayed schools as resembling nineteenth-century industrial factories, a "one-size-fits-all" institution.

However, with a new mandate, schools needed to devise ways to motivate an increasingly wide range of students. That was not easy. In earlier times, high schools could steer students who were uninterested in academic work into jobs. But now schools were expected to retain the vast bulk of youth, including those with learning disabilities or little academic ambition. Since teachers encountered many youths who found academic work neither appealing nor absorbing, the big challenge for modern secondary schools was to accommodate a wider range of student aptitude, preparedness, abilities, and motivation than any high school had ever faced before. Again, that was not easy. Unlike the monetary incentives that some organizations offer their employees, the incentives that schools offer their students can be weak. Their most obvious reward is a grade—the prime currency for higher-education admissions. But for youth who do not seek studies beyond high school, grades can be nearly useless. Schools have other organizational constraints, too. Teachers would love to have students who enrol on a fully voluntary basis, but many students attend school only through compulsion. Many teachers want to deal individually with students, but current funding levels force most classes to consist of 20 to 30 students. As it stands, teachers face large classes of captive students with greatly varying abilities and levels of motivation.

This has been the core challenge for reformers. **Progressive pedagogy**, rooted in the ideas of John Dewey in the early twentieth century, has been a force in Canadian schools since the 1960s. Progressives do not want schooling to be merely utilitarian for students and aim instead to nurture intrinsic forms of motivation, to engage students and have them work voluntarily. Modern teachers want to entice students to do their work not just for grades or to evade sanction, but out of true curiosity. Dewey called for schools that catered to the interests of the learner. By having students direct their own learning, schools could unleash students' intrinsic motivation, he reasoned. Over the decades, many reforms have attempted to engage students within the parameters of schools' organizational constraints (Labaree, 2010).

Progressives reformed schools by destructuring classrooms, creating curricula with fewer rote and memory-based exercises, and relaxing discipline. Traditional classrooms strictly regulated student talk and movement by arraying student desks in straight rows. But in the 1970s, progressives saw such regimentation as stifling student imaginations. They encouraged more interaction and tolerated some chatting and freer movement in the classroom. They also decorated classrooms, adorning walls with student artwork and colourful posters, often next to traditional emblems like the flag. Corporal punishment was largely abandoned in favour of notions of student rights. The binding idea was that departures from traditional schooling were needed to motivate student (see the Critical Sociology feature, Can Digital Technology Improve Classroom Learning?).

After witnessing these changes, researchers in the 1980s offered a different take on bureaucratic schools (Powell, Farrar, and Cohen, 1985). In their eyes, decades of reform had made schools more like "shopping malls" than factories. They were struck by the transformation of schools into human service organizations that strove to accommodate their students. Schools became mall-like, they argued, by differentiating courses by degree of difficulty and creating

Critical Sociology

CAN DIGITAL TECHNOLOGY IMPROVE CLASSROOM LEARNING?

Progressive educators strive to engage students by making classroom learning exciting, spontaneous, and fun, not coerced by rules or the lure of grades. For inspiration, progressives have sometimes used pop cultural themes in attempts to appeal to students. In earlier eras, they incorporated games like *Jeopardy* into their lessons, aiming to motivate students by structuring school material into a contest format and lure them into wanting to win. But today's students have grown up with new "rules of engagement."

No one can doubt the ascendency of digital technology in contemporary life. Almost everyone uses laptops, tablets, and cellphones for work, leisure, and school. Today's classrooms are stocked with SMART Boards and tablets, and some offer online lessons on digital platforms. Still, many progressives want to move digital technology beyond its role as a convenience or supplement to being a *transformer* of the learning process.

Progressives did not always think this way. The first wave of digital technology in the 1990s had only a limited impact on classrooms. Classroom computers were "underused and oversold" (Cuban, 2001). They served mainly as souped-up typewriters. Most teachers retained their traditional instruction styles, being unfamiliar with new technology and getting little training from administrators. However, much has changed over the past 20 years. Students and teachers are now far more conversant with an ever-wider variety of software and devices. They are more willing to buy into innovations such as interactive software, robotics, and digital games. Progressives now see potential to make learning more engrossing and captivating by having it resemble contemporary forms of leisure, sometimes "gamifying" lessons by structuring them into layered steps that aim to incentivize students to pursue a series of gratifying rewards. Such game-like structures, they hope, can deepen learning and foster traits such as creativity, initiative, and determination (Rizk, 2018).

Critical Thinking Questions

1. Much has been written about the "digital divide"—the notion that access to digital technology is highly stratified in contemporary society. If classrooms continue to use more forms of that technology, might they bridge that divide? Or might they worsen it?
2. Today's children are often greatly excited by digital devices and use them regularly in their play. How can schools harness that technology in ways that promote deep learning and not just entertainment?

electives to cater to student choice. They created "specialty shops" for students with different abilities, whether "gifted," ESL, or specially able. Schools bolstered extracurricular activities and services to address a wide variety of social, physical, and emotional problems. Educators became sensitized to different kinds of learning styles, as proclaimed in theories of "multiple intelligences," which claim that student ability in, say, dance, should be valued as much as student ability in math (Gardner, 1999; see Table 11.3).

The theory of multiple intelligences was developed by Howard Gardner (1998), who contended that the traditional notion of intelligence based on IQ testing is an overly narrow model of human potential. Gardner instead proposed that there are eight different kinds of intelligence. Some Canadian schools have embraced this theory and are designing curricula to match each type of intelligence. By doing so, they illustrate how schools are attempting to accommodate a wide range of student needs.

Although secondary schools in the past openly promoted academic achievement, the shopping-mall high school eased expectations. Mastery of core subjects was no longer expected from all students. Students who desired a more enriched curriculum could still find it, and lower-achieving students could pass from grade to grade in return for little more than orderly attendance. High schools had evolved unwritten rules about how tough certain courses should be. These informal rules unofficially designated elective courses to be easier than required math and science courses. Teachers in the latter subjects could legitimately demand much effort and time, but other teachers could face rebellion from students, parents, and even administrators if they dared to expect anything comparable.

The image of the shopping-mall high school in the mid-1980s accurately described new attempts to accommodate students. But policy priorities have since shifted. In recent decades, educators have been

TABLE 11.3 The Theory of Multiple Intelligences

INTELLIGENCE	END-STATES	CORE COMPONENTS
Logical, mathematical	Scientist, mathematician	Sensitivity to, and capacity to discern, logical or numerical patterns; ability to handle long chains of reasoning
Linguistic	Poet, journalist	Sensitivity to sounds, rhythms, and meanings of words; sensitivity to the different functions of language
Musical	Composer, violinist	Abilities to produce and appreciate rhythm, pitch, and timbre; appreciation of the forms of musical expressiveness
Spatial	Navigator, sculptor	Capacities to perceive the visual-spatial world accurately and to perform transformations on one's initial perceptions
Bodily kinesthetic	Dancer, athlete	Abilities to control one's body movements and to handle objects skillfully
Interpersonal	Therapist, salesperson	Capacities to discern and respond appropriately to the moods, temperaments, motivations, and desires of other people
Intrapersonal	Person with detailed, accurate self-knowledge	Access to one's own feelings and the ability to discriminate among them and draw on them to guide behaviour, knowledge of one's own strengths, weaknesses, desires, and intelligences
Naturalist	Biologist, naturalist	Abilities to recognize and categorize objects and processes in nature

SOURCE: Adapted from Howard Gardner and T. Hatch, "Multiple Intelligences Go to School: Educational Implications of the Theory of Multiple Intelligences," *Educational Researcher, 18* (8), 4–10. 1989. American Educational Research Association.

stung by demands to raise standards and be "accountable." Canadian policymakers typically promote this agenda by using standardized performance indicators.

Some of these critics claim that public schools are too bureaucratic. For instance, Chubb and Moe (1990) see public bureaucracies as aloof and slow to change, and requiring a mechanism to inject quality-orienting dynamics. These reformers condemn public education as an inefficient monopoly that is unresponsive to its clients, and they hail "market" reforms for their potential to create competitive pressures, similar to those faced by for-profit businesses. Under the banner of "school choice," these reformers want to force schools to survive only by collecting funds directly from fee-paying clients. The imperative to attract clients, they contend, has many advantages. It can match the tastes of parents and educators. It can encourage new providers to enter the educational field, bringing innovation to schooling, and devising customized programs for their clients. And it can boost school performance in the form of standardized test scores, since market-based schools will presumably be motivated to raise their quality to attract customers.

School choice is indeed growing in Canada in at least two forms. One creates more choice within the public school system, expanding the menu of programs beyond standard school offerings. For instance, public schools in cities like Edmonton and Toronto offer a smorgasbord of pedagogical choice and a variety of special-theme schools, including those that specialize in sports, science, language, arts, intensive academics, alternative pedagogy, and multiple intelligences (Bosetti and Gereluk, 2016). Another Alberta

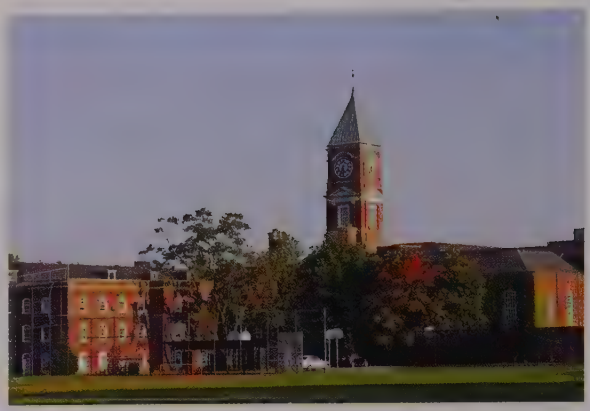
initiative has been to create "charter schools," independently run but government-funded, each pursuing a special theme, whether ESL, traditional academics, Suzuki music and philosophy, science and math, or programs aimed at gifted, Indigenous, female, or at-risk students (Bosetti and Gereluk, 2016).

The second type of choice is private schooling. The proportion of Canadian students enrolled in private schools is growing, particularly in affluent locales. For instance, in Toronto, 10 percent of students are enrolled in private schools, higher than the 7 percent national average (Pizarro, Milian, and Davies, 2017). Some of these schools attempt to appeal to their customers by developing specialty programs and small classes. Almost all offer some sort of specialty, creating an astonishing array of programs and philosophies of teaching, each seeking a niche in a competitive marketplace. Similarly, homeschooling is growing in Canada, as more parents are turning to themselves to provide educational options for their children (Davies and Aurini, 2011; Macleod and Hasan, 2017).

Are Canadian families embracing more competitive educational strategies? Traditionally, private education has been reserved either for elites or for members of religious minorities. But various forms of private education are now expanding. The tutoring industry has also undergone a staggering transformation over the past 30 years, with great growth in major Canadian cities (Aurini, Davies, and Dierkes, 2013). In 2018, a third of Ontario parents reported that they had hired tutors for their children (Hart and Kempf, 2018).

Although these private alternatives certainly create more variety in education, there is still no evidence that they offer higher-quality schooling than regular public schools do, taking into account the socioeconomic advantages of their students. Indeed, rather than being more academically intensive, many of these schools have strong "shopping-mall" and "progressive" elements, like those that have inspired public educators for decades. Proud of their customized offerings, they prize pedagogical freedom and intimate relations above all. Yet, as tuition-charging schools, they lack any mandate to ensure equal access. Despite good intentions, only wealthier families can afford them. These schools illustrate the tension between satisfying yearnings for choice and providing equity.

Indeed, a flip side of market reasoning is that the customer should pay. Such thinking has permitted



The campus of Upper Canada College in Toronto, one of Canada's premier private schools for boys. For the academic year 2015–16, the family of a new Canadian student entering Upper Canada College in Grade 12 and boarding at the school would have to pay $8700 in application and registration fees, $33 550 for tuition, and $23 960 for boarding fees: a total of $66 210 for the year. Among other amenities, the college has its own indoor, regulation-sized hockey rink.

SOURCE: © CharlineXia Ontario Canada Collection/Alamy Stock Photo.

Canadian universities to deregulate tuition fees for their professional schools, such as dentistry, law, medicine, and MBA programs. Administrators of these professional programs believe student demand will not be deterred by soaring costs, since professional degrees often lead to high incomes. Accordingly, they have raised annual tuition fees well above the Canadian average for undergraduates of $6838 in 2018–19, charging an average of $49,798 in 2018–19 for a year's tuition in an executive MBA program (Statistics Canada, 2018).

Although these fee hikes may not have discouraged student demand, they do appear to be influencing the composition of student bodies in these programs. A recent study suggests that when programs deregulate their fees, they become more likely to accept students who have highly educated parents and to have students from poorer backgrounds who are eligible for bursaries and scholarships. The losers in the process appear to be middle-class students, who lack advantageous family backgrounds yet are often ineligible for income-contingent loans and bursaries (Frenette, 2005).

These tuition trends reflect broad changes in the organizational form and governance of postsecondary schooling. In 1850, Canadian higher education consisted of a scattering of small and mostly religious institutions. Between 1850 and 1990, the system was expanded, secularized, socialized, rationalized,

coordinated, and "massified." Since 1990, most provinces have significantly reduced per-student funding, while at the same time raising performance expectations. In response, universities and colleges have become more attuned to market and government forces. In finding ways to secure new revenue sources, they have transformed themselves. For instance, to attract and accommodate new kinds of students, colleges and universities have moved far beyond their conventional weekday timetables on their main campuses and are offering courses in evenings, on weekends, at branch campuses, and via online technologies—much as a business enterprise would change to pursue new customers.

To engage in large-scale fundraising, most universities and colleges now have large public relations offices that court would-be donors and corporate sponsors. To compete with rivals, some are even engaging in "image makeovers," using consultants to "rebrand" themselves, sometimes by replacing traditional coats of arms with corporate logos and slogans (Kirp, 2004). These activities signal the encroachment of traditional missions of teaching and research by new competitive pressures, a trend decried by some as "academic capitalism" (Slaughter and Rhoades, 2004).

At the same time, provinces are expecting colleges and universities to demonstrate their effective and efficient use of tax monies by participating in quality assurance programs. Politicians increasingly want closer links between these institutions and local industries and labour markets, and to justify their receipt of public funds by meeting "key performance indicators" that signal compliance with standards of hiring, course content, and graduate placement. Importantly, however, these "KPIs" do not include any measures of student learning, but instead consist of bureaucratic formalisms that are easily counted, such as ensuring that faculty have PhDs or that courses fulfill required numbers of hours. British Columbia, Alberta, Ontario, and New Brunswick have also passed legislation allowing the opening of private degree-granting bodies, reasoning that market forces can help meet new demands for higher education.

These pressures are spawning greater organizational variety in higher education, one marked by private and for-profit universities, international branch campuses, transnational enrolments, corporate involvement, and online technologies. Venerable ideals of intellectual elites retreating in quiet contemplation are giving way to a new image of bustling "learning organizations" that can teach the masses by responding to ever-shifting market and political winds.

TIME FOR REVIEW

1. How do "progressive pedagogues" attempt to nurture intrinsic forms of motivation among students?
2. What are some prime examples of schools becoming more "accountable" and "market-like?"

CONCLUSION

Canadian schooling has grown immensely. Almost all Canadians attend high school, most graduate, more than half now go on to postsecondary school, and many will return to some sort of educational institution later in life, as ideologies of "lifelong education" become reality. But what has been the impact of this monumental expansion? Schools partially compensate for pre-existing inequalities in student preparedness, but their selection role ensures that expansion does not bring greater equity, at least along socioeconomic lines. Further, the singular socializing power of schooling in our lives actually shrinks. School becomes a weaker socializing agent as it integrates into our lives, competing with many other agents. Some forms of schooling have become more competitive. Prestigious programs that offer the most recognition and best rewards are increasingly exclusive. Other programs are more accommodating, treating students in more progressive ways and offering more choice than ever before.

These trends remind us of the paradox discussed at the outset of this chapter. Canadian schools now serve unprecedented numbers of students for longer periods of their lives, yet they are a lightning rod for more and more criticism. This is a prime instance of "disenchantment" in Max Weber's definition: As schooling becomes ever more central to society in the modern era, it loses its "magical" quality to command deference. As all citizens attend school for most of their youth, more are familiar with schooling and have higher expectations for what schools should do for them. Education has become a "motherhood" issue that everyone supports in the abstract, yet in the process it loses its overtones of elite rituals, aristocratic cultures, and time-honoured pageantry. The caps and gowns, the great halls, and Latin-inscribed coats of arms have largely disappeared, replaced by

rationalized bureaucracies that merely promise access to labour markets.

This disenchantment shouldn't cloud a sunnier accomplishment: School systems now offer unparalleled opportunities for individuals. Schooling helps extend human rights and literacy to even the poorest segments of society. Who today reminisces about bygone eras in which schooling was a privilege for the few? Such ideas now provoke a sense of outrage and are rightfully seen to deny basic rights. Schooling may be demystified, yet we cannot manage without it.

SUMMARY

1. **How has the process of school selection changed?**
   In past decades, secondary-level streaming played an important gatekeeping role, making an adolescent's performance in high school an important influence on his or her eventual life-chances. However, as higher education expands, life-chances are determined increasingly by where a person graduates in a stratified structure of higher education.

2. **How does educational expansion affect the value of school credentials?**
   As more Canadians attain advanced levels of education, formerly valuable credentials, such as the high-school diploma, get devalued; this process generates demand for more schooling as people jockey for advantages in the labour market. Educational expansion and credential inflation tend to feed off each other.

3. **What are the key patterns of inequality in Canadian schooling?**
   Along social class lines, students from more affluent backgrounds continue to enjoy considerable advantages. In terms of gender, women now outpace men on most indicators, although some female underrepresentation persists in a few fields of study. The legacy of conquest for Indigenous peoples and their history of discrimination and segregation continue to be evident in schools, while immigration selection policy over the past several decades has translated into immigrants having higher education levels than nonimmigrants.

4. **Has moral education changed?**
   Today, education is less religious than before. Schools now mostly aim to have students understand key social issues without a hard-edged, prescriptive tone. The hidden curriculum continues to emphasize the orderly completion of tasks, punctuality, and neatness. Today's schools have a more indulgent quality than they did in the past, aiming to shore up students' self-esteem and elicit rather than command their interest.

5. **How has the organization of Canadian schools changed?**
   Schools have shifted from informal institutions that wielded traditional authority to bureaucracies that attempt to cater to students in ever-more accommodating ways. In the 1970s, this process involved lessening teacher power in favour of students, although today it increasingly involves the use of market-like mechanisms to treat students as if they are "customers."

QUESTIONS TO CONSIDER

1. Compare your schooling experience with that of one of your grandparents by using the themes of selection, accommodation, competition, and sponsored and contest mobility.

2. From what you have experienced in school, how would you motivate students to be effective learners? What organizational reforms might best inspire students? Give examples.

GLOSSARY

Contest mobility (p. 243) is a form of educational competition in which most youths are grouped into the same school and exposed to the same curriculum, and in which relatively large numbers are directed to higher education.

Credential inflation (p. 255) takes place when labour market competition encourages individuals to acquire schooling and employers raise required credential levels for reasons that are not connected to their need for skilled employees.

A **hidden curriculum** (p. 247) comprises elements of school content, such as rules, procedures, structures, and norms that can shape students in covert ways.

Human capital theory (p. 254) emphasizes how schooling can enhance productive skills and thereby generate wealth for individuals and society.

Professionalization (p. 255) is the process by which an occupation attempts to raise its social standing, often by creating formal educational credentials.

Progressive pedagogy (p. 257) is an educational movement that emphasizes student-directed learning, less structured curricula, and inspiring intrinsic motivation among students.

Selection (p. 240) is the process by which the structure of schooling feeds into broader patterns of social stratification.

Sponsored mobility (p. 243) is a form of educational competition in which children are streamed in early grade levels and relatively few enter universities.

CHAPTER 12

RELIGION

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Identify the key sociological theories of religion.
- Recognize that people have a wide range of levels of religious interest and commitment, and that groups and institutions play a major role in instilling and sustaining personal religiosity.
- Distinguish religion's influence on individuals from its role supporting social structure and culture in most societies.
- Explain why the future of religion in Canada and elsewhere is secure, coexisting with the inclination of some to live life without religion.

INTRODUCTION

Religion is very much alive today. In recent years, religion has received worldwide attention in such varied developments as the election of the controversial Pope Francis, the phenomenal sales of Dan Brown's *The Da Vinci Code*, and the exposure given to atheist authors such as Richard Dawkins, Sam Harris, and the late Christopher Hitchens. Religion's presence and importance has also been blatant in ongoing global conflict and terrorism. Beyond the atrocity of 9/11, Islamic militants bombed a Catholic church in the Philippines in January 2019, killing more than twenty people and injuring some eighty more (*CBC News*, 2019). Almost exactly two years earlier, a masked gunmen entered a Quebec City mosque where evening prayers had just begun, killing six people and critically injuring another eighteen (*Globe and Mail*, 2017).

Religion also routinely receives more favourable and peaceful attention—such as world-wide coverage of what has been referred to as a "barnstorming sermon on the power of love." This social media sensation was delivered by African American Episcopal Bishop Michael Curry at the royal wedding of Prince Harry and Meghan Markle in May 2018 (*CBC News*, 2018).

In North America, religion's presence is also regularly evident in the God-laced responses to Islamic militancy on the part of political leaders in the United States, whose supporters frequently include many members of the so-called Christian Right. Apart from its links to global issues, religion in the United States is pervasive. Attendance at services is relatively high and most people say that religion is very important to them. The organizational health of American religion can be seen in the emergence of a growing number of large and influential "megachurches," such as Joel Osteen's much-publicized Lakewood Church that occupies a 16 000-seat former basketball arena in Houston. Far from having only a local focus, many function as religious multinational corporations—spreading the message of "how to do ministry" to other parts of the world, including Canada. Further, spirituality has joined religion in going public and becoming part of pop culture, as evidenced by the immense popularity of books such as Rhonda Byrne's *The Secret* and Eckhart Tolle's *A New Earth*.

In Canada, religion's ongoing presence can be seen in most people continuing to identify with a religious tradition; in the growing numbers of individuals identifying with Islam, Hinduism, Sikhism, and Buddhism; in the widespread interest in spirituality; in debates about sexual orientation and gender; and in the ongoing efforts of Catholics and mainline Protestants to resolve problems relating to the legacy of residential schools.

Many early social scientists were convinced that religion's days were numbered, that it would be just a short time before it was discarded in favour of science. Through the 1990s, the widespread consensus was that religion's influence was declining and that Canadians and people in most other technologically advanced countries were leaving religion behind—although the United States stood out as a puzzling anomaly.

We now know that such observers were wrong. In the early decades of the twenty-first century, religion lives on, embraced by large numbers of people in virtually all cultures, however "advanced" or "nonadvanced." Moreover, interest in religion and spirituality is actually on the upswing in many parts of the world, including North America, Russia, and Asia. In many Islamic countries, it is not clear that the importance of religion has ever been in doubt. Today, religion is frequently associated with conflict and division. But it also continues to bring meaning, sustenance, and hope to billions of people.

I begin the chapter by taking a brief look at what some of the early and influential social scientists had to say about religion, and then discuss how sociologists go about studying religion in both its individual and group forms. After clarifying what sociologists mean by religion, I look at "how much of it" we have in Canada and proceed to examine its sources and consequences—what kinds of factors contribute to people being religious and the influence that religion has on both individuals and societies. In concluding the chapter, I reflect on the kinds of religious developments we can expect in the future.

I'll be giving particular attention to Canada, in large part because I have spent much of my life examining religious developments here and have some fairly unique research findings I can tell you about. However, while focusing on Canada, I will keep my eyes on the rest of the world, starting with the United States.

SOCIOLOGY AND RELIGION

A number of years ago, an American evangelist who was holding services in Edmonton was asked by a fairly strident television interviewer, "How do you

Contrary to the opinion of some people, religious belief is not disappearing in Canada. In fact, in urban areas, most people have many options for worship.
SOURCE: © Dick Hemingway.

know there is a God?" The evangelist immediately responded, "Because I talked to Him five minutes ago." It was an interesting claim but one that a sociologist is not in a position to verify. A basic rule of science is that "what counts as real" is what we can detect through our senses—what we refer to as "empirical" knowledge. In contrast, proponents of religion have traditionally asserted that the world we know through the senses is only part of a greater reality that, because of the limitations of sense perception, can only be known through faith.

In principle, science and religion are compatible. Science limits itself to what is perceivable, and religion maintains that reality includes the nonperceivable. Conflict between the two should arise only when one oversteps its boundaries and invades the other's territory.

Still, for the most part, science is in the driver's seat. As Émile Durkheim (1965 [1912]: 479) pointed out many years ago, religion "can affirm nothing that [science] denies, deny nothing that it affirms." Try though it might, religion cannot overrule science in refuting basic evolutionary claims or dismissing sound medical diagnoses. At the same time, since science is limited to conclusions about the observable, it too can go only so far. Sociologists cannot address the evangelist's claim that he had actually spoken to God, any more than it can evaluate the claim that a person whose cancer has gone into remission was healed by God.

Sociology consequently suffers from one serious methodological limitation in studying religion: It cannot probe the supernatural claims that religion so often is about. Sociologists nonetheless can offer considerable insight into "the observable part" of religion. For example, they can examine the following:

- Who tends to think they have experienced God.
- Who believes in life after death and what individuals think will happen when they die.
- The extent to which people have spiritual needs, and what they mean by spirituality.
- How many and what kinds of people are involved in religious groups.
- The impact that religious involvement has on individuals and societies.

In short, sociologists cannot address everything when it comes to religion, but they can address much without getting caught up in the issue of religion's ultimate truth or falsity. Max Weber summed up the focus of sociological explorations into religion this way: "The "essence" of religion is not even our concern," he wrote, "as we make it our task to study the conditions and effects of a particular type of social action" (1963 [1922]: 1). For our purposes, whether or not religious ideas are true is not as important as the fact they are often *believed* to be true. As W. I. Thomas and Dorothy Swaine Thomas noted in their classic theorem, if we define things as real, they are real in their consequences (Thomas and Znaniecki, 1918: 79). The very fact that religious ideas are held means they potentially can have an important impact on individuals and social life.

THEORETICAL TRADITIONS

Three early theorists—Karl Marx, Émile Durkheim, and Max Weber—have had a strong influence on the sociology of religion.

MARX AND CONFLICT

Karl Marx grew up in a non-religious environment but came to believe that religion is a human creation.

Marx (1970 [1843]: 131) wrote, "Man makes religion; religion does not make man." He argued that man has "found only his own reflection in the fantastic reality of heaven, where he sought a supernatural being," and that being religious characterized "the self-consciousness and self-esteem of a man who has either not yet gained himself or has lost himself again."

We can resolve undesirable conditions by either changing them or reinterpreting them. Peasants, slaves, and the marginalized in our day theoretically can rise up and revolt; they also can minimize the importance of "this world" by looking heavenward, singing spirituals, and dreaming of walking streets of gold after they die. According to Marx, religion constitutes the latter response, resulting in people who are economically and politically deprived redefining reality, rather than changing their oppressive conditions. Religion, Marx wrote, soothes the disadvantaged like a narcotic—functioning as "the opium of the people" (Marx, 1970 [1843]: 131), in the process blinding them to the inequalities at hand and bottling up their creative energies. So it is that some observers today would argue that many socially and financially deprived individuals who are unable or unwilling to play an active role in altering social conditions or even their own lives substitute religious status for social status. A taxi driver by day is the head of a temple committee by night; the housekeeper in the hotel during the week is the star soloist in the church choir on the weekend. Religious status supplants social status; the next world supplants this world.

Marx did not see such a redefining of reality as a chance happening. On the contrary, he maintained that those who hold power encourage religious belief among the masses as a subtle tool in the process of exploiting and subjugating them. Aligned with the interests of the dominant few, religion serves to hold in check the potentially explosive tensions of a society.

Consistent with his thinking, respected social historian H. Richard Niebuhr (1957 [1929]: 51) has been among those who have claimed, for example, that a widely held belief among nineteenth-century American slave owners was that religion helped African Americans to become "better" slaves. He cites one advocate of "negro missions" who asserted that "slaves well-instructed in the Christian faith were less likely to develop revolutionary inclinations than the half-educated, such as [revolt leader] Nat Turner."

Historically, said Marx, society and religion were so intertwined that attacks on feudalism, for example, were attacks on the church, while revolutionary social and political doctrines were simultaneously viewed as theological heresies (Marx and Engels, 1964: 132). We might argue that we see similar fusion between politics and religion today, not only in theocracies, such as Iran, but also in such a country as the United States, where the dominant religion, according to some observers, is "the American Way of Life," supported by the country's primary religious groups. We'll return to this issue shortly.

For Marx (1970 [1843]: 131), religion was an inadequate salve for a sick society—"the sigh of the oppressed creature, the heart of a heartless world and the soul of soulless conditions." When the sickness was remedied, there would be no need for the salve. Freed from the panacea of religion, individuals would be able "to think, act, and fashion their reality with illusions lost and reason regained" (Marx, 132).

If you are someone who is personally religious, you understandably are not particularly excited to have Marx suggest that you may well be disadvantaged in some way and need to open your eyes and give your energies to changing your current situation. But before you reject his thinking altogether, it is worth noting that, at minimum, Marx seems to offer considerable insight, even today, into why some people join extreme religious groups that downplay the importance of this life—encouraging them to give up what possessions they have and, in some instances, give up their lives as well.

DURKHEIM AND COLLECTIVITY

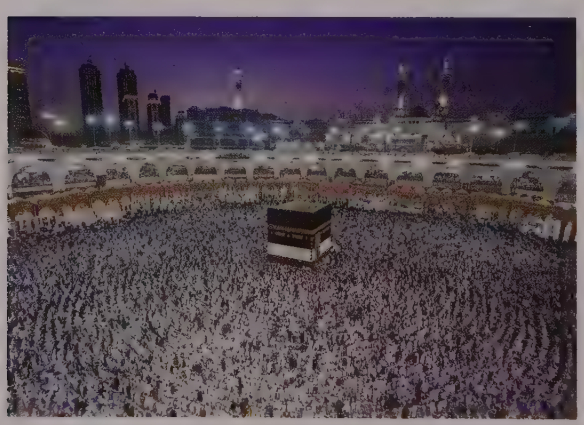
Émile Durkheim was the son of a rabbi but was raised in a Catholic educational tradition. He himself was an atheist and an anti-cleric, who believed that a scientific understanding of society has the potential to raise the quality of social life.

In his classic work *The Elementary Forms of the Religious Life* (1965 [1912]), Durkheim argued that religion's origin is social. People who live in a community come to share common sentiments, and as a result a **collective conscience** is formed. When they gather together, they have a feeling of being in the presence of something beyond themselves that is experienced by each member, yet is greater than the sum of their individual consciences. The feeling is not unlike "the electricity in the air" we experience at an exciting playoff hockey game or a big rock concert, where that feeling "out there" seems to transcend the sum of individual emotions. Durkheim maintained that the experience is so vivid that people have felt

the need to label it. In reality, Durkheim asserted, "God" is the group experiencing itself. The experience *is* real, he argues; it's just that it isn't what those involved think it is.

Once people experience such an alleged supernatural reality, they proceed to designate some related objects as **sacred** and others as **profane**. Christians have accorded special status to the cross, the Bible, and holy water, in contrast to almost everything else. Symbols of the sacred are many and diverse: Jews have assigned sacred status to the Torah and Star of David, Muslims to the Qur'an and the Saudi Arabian city of Mecca, Hindus to the Vedas and the sacred syllable "Aum" (or "Om"). In Durkheim's view, religious beliefs articulate the nature of the sacred and its symbols, and religious rites provide guidelines as to how people should act in the presence of the sacred. So it is that Muslims, for example, are expected to pray at specific times five times a day, facing Mecca, and to make a pilgrimage to Mecca at least once in their lifetimes; Hindus offer daily devotional prayers in the morning and evening, sometimes accompanied by ritual bathing. Sikhs, when they enter their temples, must cover their heads and remove their shoes, and, where the opportunity is provided, wash their hands and feet.

Because all groups feel the need to uphold and reaffirm their collective sentiments, people come together in what Durkheim refers to as a "church." According to Durkheim (1965 [1912]: 62–63), "the idea of religion is inseparable from that of the church," since it is "an eminently collective thing." Even when religion seems to be entirely a matter of individual conscience, it still is nourished by social sources. Besides meeting needs at the individual level, he claimed, religion creates and reinforces social solidarity. Collective life is consequently both *the source* and *the product* of religion. Accordingly, Durkheim (62) defined religion as "a unified system of beliefs and practices relative to sacred things . . . which unite into one single moral community called a Church, all those who adhere to them."



Pilgrims at the Great Mosque of Mecca. In Durkheim's view, religious rites provide guidelines for how people should act in the presence of the sacred.

SOURCE: © Sony Herdiana/Shutterstock.

Durkheim observed that "we are going through a stage of transition and moral mediocrity. The great things of the past which filled our fathers with enthusiasm do not excite the same ardour in us." He added poetically, "The gods are growing old or are already dead, and others are not yet born." But despite the problems of traditional Catholicism in particular, Durkheim didn't believe that religion would disappear: "There are no gospels which are immortal, but neither is there any reason for believing that humanity is incapable of inventing new ones" (1965 [1912]: 475–76). The dominant groups and forms of expression might change, but the social sources that give rise to religion obviously will remain and, with them, religion. Durkheim also contended that there would always be a place for religious explanations. The reason? Science is fragmentary and incomplete, advancing too slowly—life cannot wait. Religion will therefore continue to have an important "gap-filling" role.

Durkheim's legacy has been important. You don't have to agree with his assertion that the gods are socially created to realize that God and ethical conceptions, for example, frequently reflect social and individual characteristics. In fact, an age-old concern among people valuing faith has been the inclination of humans to create the gods in their own images. What's more, Durkheim's acknowledgment that science moves too slowly for many of us anticipated the ongoing "market" for alternative explanations on the part of religious leaders and just about anyone else, including—to use just one illustration—psychic phenomena. The vast market for explanations of the unknown is evident from the fact that in early 2019, Google listed some 119 million entries for "psychic"—double the number just five years earlier.

WEBER AND IDEAS

Max Weber was born in Germany. His grandparents were Protestants who had been refugees from Catholic persecution and eventually became successful

in business. He was interested in religion from an early age but never shared the deep commitment of his Calvinist mother. His background was reflected in one of his most important works, *The Protestant Ethic and the Spirit of Capitalism* (1958 [1904–05]).

Weber's interest in the origin and nature of modern capitalism led him into extensive debate with Marx's ideas and stimulated much of his work in the sociology of religion. Unlike Marx and Durkheim, Weber had little interest in the question of whether religion is ultimately true or false. Rather, he maintained that religion, in addition to having a supernatural component, is largely oriented toward this world. As a result, religious ideas and behaviour should frequently be evident in everyday conduct. In *The Protestant Ethic and the Spirit of Capitalism*, for example, Weber examined the possibility that the moral tone that characterizes capitalism in the Western world—the Protestant ethic—can be traced back to the influence of the Protestant Reformation. His hope was that his work would contribute "to the understanding of the manner in which ideas become effective forces in history" (Weber, 1958 [1904–05], 90).

Weber took the position that ideas, regardless of whether they are objectively true or false, represent a person's definition of reality and therefore have the potential to influence behaviour. Accordingly, he emphasized the need to interpret action by understanding the motives of the actor (a method he called *Verstehen*, or understanding). To achieve such awareness, he said, researchers should place themselves in the roles of those being studied.

Weber understood the need to study diverse societies, present and past, to examine culture's influence on religion. He therefore embarked on comparative and historical studies of religion and its relationship to social and economic life in China, India, and ancient Israel. A compilation of his writings, *Sociology of Religion* (1963 [1922]), illustrates the way that Weber approached religion. He noted that god-conceptions are strongly related to the economic, social, and political conditions in which people live. The gods of light and warmth and of rain and Earth have been closely related to practical economic needs; heavenly gods that rule the celestial order have been related to the more abstract problems of death and fate. In political conquest, the gods of the conquered are fused with the gods of the conqueror and reappear with revised characteristics. Furthermore, the growth of **monotheism** (belief in one god) is related to goals of political unification.

Beyond the social sources of the gods, Weber dealt with such major themes as the relationship between religion and social class, and the nature of religious organizations. He reflected on religious leadership and the important process whereby a personal following is transformed into a permanent congregation, which he referred to as "routinization." He noted that different groups in society vary in their inclination to be religious: Peasants are religious when they are threatened; the nobility find religion beneath their honour; the middle class sees religion largely in ethical terms; the working class supplants religion with other ideologies.

Over the years, I have found that students, whether religious or otherwise, appreciate the way in which Weber attempted to take religion seriously and not become embroiled in attacking it or dismissing it. His approach has become fairly typical in the contemporary study of religion. Some of the ideas of Marx and Durkheim have also remained insightful.

TIME FOR REVIEW

1. According to Marx, why does religion distort reality?
2. What did Durkheim mean when he held that the origin of religion is social?
3. Weber argued that social conditions can influence religious ideas while religious ideas can influence people's behaviour. Illustrate both processes.

THE NATURE OF RELIGION

Are you religious? If you are like many Canadians, you may promptly say, "Yes" or "No, I'm not," or indicate, "I'm spiritual but not religious." The term *religion* is widely used, but obviously people have different ideas in mind when they use it. Up to now, I have been assuming that we have a shared understanding of what we mean by "religion." But before we go much further, and particularly before we look at research on religion, we need to clarify what we actually mean by the term.

"Religion" can be a blurry concept. Many people use it in a functional sense: What people value most becomes their religion—money, career, family, sports. The problem with such functional definitions of religion, sociologist Peter Berger (1974: 129) once observed, is that they become like grey cats on a dark night. If religion is everything, then it is nothing.

In a pioneering work, Charles Glock and Rodney Stark (1965) offered some thoughts that remain

helpful. They pointed out that, in defining religion for social scientific purposes, we should begin by recognizing that humans develop systems of meaning to interpret the world. Some systems—commonly referred to as **religions**, including Christianity, Judaism, and Islam—have a supernatural referent. Others do not, such as a science-based system (scientism) or political "isms" (e.g., socialism). The latter systems, they suggested, might be viewed as human-centred or **humanist perspectives**, in contrast to *religious perspectives*, which are succinctly referred to here as *religions*.

The two types of perspectives differ on one critical point: Religion is concerned with discovering life's meaning, and humanist perspectives are concerned with making life meaningful. Philosopher Bertrand Russell stated the humanist position well: "I do not think that life in general has any purpose. It just happened. But individual human beings have purposes" (in Cogley, 1968: 171). Religious perspectives suggest that our existence has meaning, preceding that which we, as humans, decide to give it. In contrast, humanist perspectives assume that life has no "ultimate meaning" and therefore focus on giving it meaning.

The dichotomy is not perfect; some would say that such criteria might lead us to see Buddhism, for example, as a humanist perspective. Here I would simply defer to commonly understood thinking and place Buddhism in its familiar religion category for the sake of communication. However, for the most part, I think the religious perspectives/humanist perspectives approach is helpful.

PERSONAL RELIGIOSITY

Now that I've clarified things a bit, let's go back to the pointed question: How religious are you? And to be less pointed, how religious are Canadians as a whole? Sociologists have not believed that the answers are arbitrary or simply subjective. They have given much effort to finding ways of defining and measuring what they have called **personal religiosity**.

Much of the early research used one of three basic indicators to determine the religiosity of a person. All three assumed group involvement: identification, membership, and attendance. In surveys, people were asked questions, such as "What is your religious preference?" "Do you belong to a religious congregation?" and "How often do you attend religious services?" People who indicated that they had a religious preference, belonged to a local religious group, or attended religious services with regularity were viewed as religious.

However, as you know well, simply knowing that someone is "Protestant" or "Hindu," "Jewish" or "Mennonite," tells us very little about a person's actual commitment to his or her faith. Similarly, people might be group members, but members may be active or inactive, committed or uncommitted. And service attendance, although measuring participation in a group, excludes people who could be very committed yet, for such reasons as age, health, work schedule, and geographical location, are not overly active in a religious organization.

Since the mid-1960s, social scientists have responded to the limitations of these three measures by viewing religious commitment as having a variety of dimensions. In one of the more helpful frameworks, Stark and Glock (1968) suggested that the religions of the world typically expect their most devoted followers to hold key beliefs, engage in certain practices, have supernatural experiences, and be aware of the central tenets of their faiths. Stark and Glock referred to these belief, practice, experience, and knowledge components of commitment as **dimensions of religiosity**. It is not enough to believe *or* practise *or* experience *or* know—all four traits are expected of the committed.

My ongoing Project Canada national surveys, which to date span 1975 through 2015, provide comprehensive data on personal religiosity in this country. The surveys have found that Canadians continue to exhibit relatively high levels of religious belief, practice, experience, and knowledge (see Table 12.1). Indeed, more than seven in ten say they believe in God, more than six in ten maintain there is life after death, nearly five in ten acknowledge that they pray privately at least once a month, and nearly five in ten think they have experienced the presence of God. Almost half also exhibit some basic knowledge of Islam, Judaism, and Christianity. On the surface, then, early twenty-first-century Canadians seem to be fairly religious people.

That said, things have been changing. Two colleagues and I have just completed an extensive examination of Canadian Millennials born since 1985 (Bibby, Thiessen, and Bailey, 2019). We drew on two recent major national surveys involving some 6000 people.

We found that religious polarization is more blatant than perhaps at any time in Canadian history. Religion and spirituality are important for

TABLE 12.1 Religious Commitment along Four Dimensions, Canada, 2015 (percentage)

DIMENSION	RESPONSE	PERCENTAGE
Believe in God	Yes, I definitely do	41
	Yes, I think so	32
	No, I don't think so	14
	No, I definitely do not	13
Believe in life after death	Yes, I definitely do	29
	Yes, I think so	37
	No, I don't think so	22
	No, I definitely do not	12
Practise private prayer	Daily	22
	Several times a week to weekly	16
	Three times a month to monthly	10
	Less than once a month	8
	Hardly ever/never	44
Experience God	Yes, I definitely have	20
	Yes, I think so	27
	No, I don't think I have	30
	No, I definitely have not	23
Knowledge	The name of the sacred book of Islam (Qur'an)	58
	The first book in the Old Testament (Genesis)	42
	Who denied Jesus three times? (Peter)	31

SOURCE: Derived from Angus Reid and Reginald W. Bibby, *2015 Religion Survey.* Vancouver: Angus Reid Institute.

a large number of Millennials. Beliefs, practices, involvement, and the expression of spiritual needs characterize the lives of many of them. However, a noteworthy core of about one in three have little use for organized religion. Further, Millennials enjoy a wide variety of choices when it comes to religion and spirituality. Consequently, there is less consensus on conventional beliefs than there used to be, a greater sense that organizational involvement is optional, and a recognition that spiritual needs can be met in diverse ways, if they need to be met at all. Millennials can opt for faith, bypass it, or draw on some of its features when they find it is expedient to do so. Our findings are consistent with those of others who have studied young Canadian Muslims, Hindus, and Buddhists (Beyer and Ramji, 2013: Beyer et al., 2017). Similar tendencies have been documented in research in the United States (Wuthnow, 2007) and Sweden (Minganti, 2010).

What stands out from our findings and other studies is how pervasive individualism, choice, and subjectivity are in how Millennials, regardless of religious tradition, approach religion and spirituality. Although parents and family are invariably the most influential source in the faith development of children, Millennials do not want to simply accept what their parents hand down to them. They want control and choice, with technology, the Internet, and social media assisting in exposing them to the limitless religious and spiritual options available. Moreover, our surveys suggest that there is limited interest in organized religion on the part of two visible and vocal groups—Indigenous people and members of the LGBTQ community.

COLLECTIVE RELIGIOSITY

People often say, "I don't have to go to church to be religious." Increasingly the generalization has been expanded to include temples and synagogues as well. It may be a common claim, but it doesn't have much sociological support.

Most social scientists, beginning with Durkheim, have maintained that personal religiosity is highly

dependent on **collective religiosity**, or group support of some kind. Such dependence is not unique to religion. It stems from a basic fact of life: The ideas we hold tend to come from our interaction with other people. However creative we might like to think we are, the fact is that most of the ideas we have in our heads right now can be traced back to the people with whom we have been in contact—family, friends, teachers, authors, journalists, and any number of other so-called experts. Moreover, if we are to retain those ideas, they have to be continually endorsed by at least a few other people whose opinions we value. Ideas are sustained by relationships.

Consequently, it is not surprising that researchers find that evangelicals, for example, one of the most numerically vibrant "religious families" in the country, have learned that they need to "grow their own and keep their own." They have more children than members of most other groups do, provide them with positive church-life experiences from the time they hit the church nursery, make sure they have youth-friendly programs when they are teens, and encourage them to marry each other—or if worst comes to worst, marry an outsider and bring the partner into the group—and then continue to be part of young adult and adult activities. To fail at any of those three crucial points in the biography of their daughters and sons is to run the risk of seeing them abandon evangelical faith. People cannot hold ideas or commitment for long without a measure of social support.

Seem like a strong claim? Try it on your own biography.

The Church–Sect Typology

Those who have examined religious groups in predominantly Christian settings have recognized two major kinds of organizations. First, there are numerically dominant groupings—the Roman Catholic Church in medieval Europe, the Church of England, the so-called mainline denominations in Canada and the United States (Anglican, United, Presbyterian, Lutheran), and so on. Second, smaller groups, called **sects**, have broken away from the dominant bodies. For example, in the sixteenth century, Protestant groups, including the Church of England, broke away from the Roman Catholic Church; but Methodists in turn broke away from the Church of England, and the Salvation Army emerged as a breakaway group from the Methodists. Today, additional emerging groups include an array of Baptist and Pentecostal denominations and nondenominational "grassroots" congregations that are found in virtually every North American city.

From this pattern of dominant groups and breakaway groups, sociologists who have tried to make sense of religious groups developed a scheme known as the church–sect typology. This framework attempted to describe the central characteristics of these two types of organizations, as well as account for the origin of new groups.

Although the church–sect typology has been used extensively, alternative ways of understanding religious groups have become increasingly popular.

Organizational Approaches

From the standpoint of sociology, religious organizations are no different from other social organizations. Therefore, there has been a growing tendency to analyze religious groups by making use of the same frameworks we use in studying social organizations in general.

Led by the work of respected American sociologist Rodney Stark and his associates (Finke and Stark, 1992; Stark and Bainbridge, 1985; Stark and Finke, 2000), a **market model** for understanding religion has become prominent in recent years. Religious groups are seen as "firms" or "companies" competing for "market share." Accordingly:

- Seen through such eyes, the Roman Catholic, Anglican, and Eastern Orthodox churches are part of multinational corporations; so is the Salvation Army.
- A number of groups, including the United Church and the Pentecostal Assemblies of Canada, are companies that are "Canadian-owned and -operated."
- Many smaller evangelical Protestant denominations have been "branch plant" operations of American groups—not unlike "Ford Canada" or "Walmart Canada"—that, over the years, have become increasingly autonomous. Some other groups, including Presbyterians and some Lutherans and Baptists, have similarly evolved from overseas operations.
- Despite the fact that Jews, Muslims, Hindus, Sikhs, and Buddhists all have worldwide roots and ongoing ties with those roots, none has developed official international or national structures that oversee their Canadian businesses. They have lobby groups and other organizations that address some common interests.

But their "business outlets" are typically highly autonomous, with their synagogues, mosques, and temples owned and operated by their local congregations.

- Similarly, large numbers of other religious firms operate as privately-owned companies. They are started by religious entrepreneurs who are convinced that a market exists for their particular product. The early days are often modest, with operations launched in homes, schools, and warehouses. Some are successful; many are not.

Apart from provocative marketing language and corporate analogies, a general organizational approach to religious groups sheds new light on basic features of religious groups, including (1) the nature and the sources of their members, (2) their formal and informal goals, (3) the norms and roles that are established to accomplish their purposes, (4) the sanctions that are used to ensure that norms are followed and roles are played, and (5) the degree of success that groups experience in pursuing their goals. Let me briefly illustrate.

Membership

When studying the membership of religious groups, it becomes readily apparent that the vast majority of those involved are following in parental footsteps. Canadian census data show that when two parents have the same faith, some 95 percent of their children are also raised in that faith. As a result, new additions to almost any given congregation are primarily active members who are on the move geographically. These include people coming to Canada from other countries. For example, before the 1970s, the United, Anglican, and Presbyterian denominations were heavily populated by immigrants from Britain and their offspring. Since the 1980s, immigrants have been the primary source of Hindu, Sikh, Muslim, and Buddhist growth. Given the extensive worldwide expansion of Roman Catholicism, Pentecostalism, and Islam, "immigration pipelines" are going to favour those traditions in the immediate future. Conversely, the "pipelines" have been drying up for the United, Anglican, and Presbyterian churches (Bibby, 2017:16–17; Bibby and Reid, 2016: 45–52; Reimer and Hiemstra, 2018).

Congregations frequently compete with one another for members and staff, especially in urban areas where some "outlets" are larger and more affluent than others are. The more attractive congregations typically have the resources to search farther for their leaders and hold them longer. They also have better physical facilities. It's not just a Protestant or Catholic phenomenon: Muslims, Hindus, Sikhs, Buddhists, and Jews typically define their meeting places as important centres for social activity. Consequently, groups tend to build structures as lavish as their resources will permit.

In recent years, a number of Protestant "megachurches" have come into being in Canada and the United States. These "religious superstores" typically have seating for 1000 to 4000 people, are serviced by many full-time staff members, and have annual budgets in the millions of dollars. They are found in major cities, such as Toronto, Montreal, Winnipeg, Edmonton, Calgary, and Vancouver, but they also are appearing in smaller communities, such as Abbotsford, Red Deer, and St. Catharines. They typically co-opt technology and culture. PowerPoint and worship bands, cellphones and texting are part of services, with Starbucks coffee commonly found both outside and inside sanctuaries.

These megachurches make it difficult for other congregations to compete. Catholics are showing signs of following suit, recognizing that one way of dealing with the priest shortage and the need for specialized ministries is to have larger, regional parishes. The Archdiocese of Toronto, for example, has opened a large 1000-person church each year since 2000 (Bibby and Reid, 2016:51).

Congregations, like secular businesses, also expand their services and personnel in keeping with their economic means. Some of the megachurches, for example, offer many of the typical worship and

During the 1980s and 1990s, immigrants contributed most of the growth to Hindu, Sikh, Muslim, and Buddhist groups in Canada.
SOURCE: © iStockphoto.com/David P. Lewis.

educational opportunities of more traditional, older groups. But they also have extensive programs aimed at children, teenagers, young adults, and seniors. The programs range from small but sophisticated groups studying in homes ("cell groups"), through well-developed music and drama programs, to multimedia education, entertainment, and elaborate Web activities that often include podcasts. A room in one well-known British Columbia megachurch resembles a 1950s diner—complete with a car front, jukeboxes, booths, and stools. As the church's head youth minister told me, "The young people love this room; but the seniors love it too." An obvious point of tension involves maintaining integrity while providing products that attract customers.

Goals

The conscious and unconscious goals of local religious groups vary by congregation and members. Like the goals of other social groupings, these conscious and unconscious goals commonly appear to be in conflict. For years observers have noted that the formal goals derived from religious doctrine, such as spiritual growth, frequently exist in tension with "survival goals" relating to numerical growth that translate into necessary human and financial resources (Metz, 1967).

Similarly, congregations have always had difficulty reconciling their pastoral or "comfort" function with their prophetical or "challenge" function (Glock, Ringer, and Babbie, 1967). For example, the national leadership of the United Church of Canada viewed itself as prophetic in its call during the mid-1980s to allow gays and lesbians to be eligible for ordination as ministers. In taking such a controversial position, the denomination lost a sizable number of dissenting members and, in some cases, entire congregations (O'Toole et al., 1993). Prophecy has its organizational price.

There is an additional point of tension: how to satisfy the needs of the existing clientele while reaching out to new people who are not involved yet have important needs themselves. For example, as the twenty-first century began, the most divisive issue in U.S. Protestant congregations was whether church music should be traditional and oriented toward *insiders* or contemporary and aimed at *outsiders*. It is a dilemma that congregations of virtually all religious stripes are not particularly adept at resolving, with obvious negative implications for growth.

Norms, Roles, and Sanctions

If groups, like companies, are to achieve their official and unofficial goals, they have to be able to establish norms for what has to be done and assign roles for their members to play. An examination of congregational roles reveals that most groups in Canada—led by Catholics, evangelicals, Muslims, Hindus, and Sikhs—often have a human resource problem for two main reasons. The first is that they have been top-heavy with men and often have inadequately tapped the resources of women, a reality that has been variously met with acquiescence, resistance, and a measure of change (Dawson and Thiessen, 2014; Nason-Clark, 1993; Nesbitt, 1997; Speaker-Yuan, 2005; Stackhouse, 2005).

The second problem is that groups typically rely on volunteers to carry out key roles. These are the same people congregational leaders have to work hard to recruit and retain—people on whom they depend for involvement and financial support. They are not hired and they can't be fired. It adds up to a situation in which religious groups are frequently fragile and inefficient companies (Bibby, 1993; Brannon, 1971; Monahan, 1999).

Success

In their studies of religion in Canada, researchers have tended to emphasize "the numerical bottom lines" of religious groups and to focus on such indicators of success as attendance, membership, and finances.

Through the early 1990s, the research news was not particularly good for organized religion. Overall, attendance and membership were down, with some groups feeling great hardship as a result of inadequate finances. The mainline Protestant groups—the United, Anglican, Presbyterian, and Lutheran churches—were the most severely hit, along with Roman Catholics in Quebec (Bibby and Reid, 2016; Clarke and Macdonald, 2017). Despite some attendance and membership losses, the Roman Catholic Church outside Quebec appeared to be relatively healthy. And although their numbers were not as large as many people think, conservative Protestant groups were at least able to hold their own and grow modestly—a significant accomplishment, given that they have represented only about 8 percent of the population since 1871 and could have readily been absorbed by larger competitors.

Other faith groups, such as Hindus, Muslims, Sikhs, Jews, and Buddhists, were having a difficult

time growing, primarily because they were having considerable difficulty holding on to their offspring, who all too frequently were marrying Catholics, Protestants, and people with no religion (Brym, Shaffir, and Weinfeld, 2010).

The size of a group is largely a function of immigration, birth, and mortality factors. What was disconcerting for religious leaders in Canada through the early 1990s was that most groups were top-heavy with older people, and many did not seem to be able to replace them with comparable numbers of younger people. As a result, it was estimated that, by 2015, weekly attendance would drop dramatically for mainline Protestants and Quebec Catholics, decline slightly for "Other World Faith" groups (Jews, Muslims, Sikhs, Hindus, and Buddhists), and remain fairly stable for conservative Protestants and Roman Catholics elsewhere in Canada (Bibby 1993: 103ff). There was a very real possibility that the dominant players on the Canadian religious scene would be Roman Catholics and evangelical Protestants.

Such projections have been proving accurate. However, as we will see shortly, there is good reason to believe that the "old story" of secularization needs to be replaced by a "new story" of polarization. **Religious polarization** refers to the growing tendency of some people in a given setting to embrace religion and the tendency of others to reject it. A solid and growing core of Canadians are choosing to live life without religion. Simultaneously, a solid and durable core continues to see faith as important. The ongoing significance of religion for many people appears to reflect the efforts of groups to be more effective in addressing the needs and interests of children, teenagers, and young adults (see the Critical Sociology: The Funding of Religious Education feature).

Religious groups are increasingly recognizing the importance of connecting with culture. Here, Toronto Roman Catholic Archbishop Thomas Collins wears a Maple Leafs sweater in St. Peter's Square at the Vatican in February 2012, during the week when he was elevated to cardinal.

SOURCE: Emanuel Pires/Archdiocese of Toronto.

Critical Sociology THE FUNDING OF RELIGIOUS EDUCATION

An accurate reading of the Canadian religious situation today leads to the conclusion that we are a highly polarized country, as are most countries in the world.

Such a situation raises an important question: Can people with extremely diverse inclinations toward religion live in harmony? Over time, our much-heralded mosaic has been able to include tiles for pretty much everybody. But the emergence of religious polarization may put the resilience of the mosaic ideal to an unprecedented test.

For starters, we have seen growing dissension in Canada in recent years over the use of the term "God" in public speeches, prayers in public schools, and references to "Christmas" and "Easter." Invocations that used to launch graduation ceremonies have either been refurbished or abandoned altogether. However, things are just warming up. An issue in Canadian public life that undoubtedly will see intensified debate is the funding of religious schools.

To secure Quebec's agreement to enter Confederation in 1867, state support for both the Protestant and Roman Catholic school systems was enshrined. The Protestant system evolved into the public system but full funding for Catholic schools has continued through today in Ontario, Alberta, Saskatchewan, and the Territories. In addition, the four western provinces, along with Quebec and the Territories, offer partial funding to religious schools of any faith that meet certain criteria. The Atlantic provinces stand alone in providing no funding for religious schools. Anomalously, Ontario stands alone in providing funding for Catholic schools only—full funding at that.

As would be expected, not everyone is happy with these varied funding rules, particularly in

(*continued*)

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Ontario where a variety of religious groups have decried the current situation as both unfair and out of sync with the diversity of the twenty-first century. In 1999, the UN's Human Rights Committee ruled that the sole funding of the Catholic system was discriminatory, and that the public financial cupboard should either be open or closed to all religious schools. Others strongly disagree, sharing the view of the Ontario Public School Board Association that such an extension of funding would only contribute to fragmentation and division.

Some individuals and organizations say the time has come to end the funding of religious schools altogether. The Canada Secular Alliance, for example, takes the position that governments should not expend any public funds on religious schools since, among other things, faith-based education segregates students and increases prejudice and intergroup mistrust. All that is required to eliminate any constitutional obligations, it notes, is a simple, provincial–federal amendment.

Ontario Roman Catholic educators object. In 2013, the Catholic Trustees Association launched a province-wide campaign to clarify the role and value of Catholic schools and strengthen political and public support. Across the country, other religious groups maintain that public educational systems, rather than being ideologically neutral, promote secular humanism. In a pluralistic Canada, such groups argue, they should be able to receive public funding in the course of offering students an education that conforms to provincially prescribed core curricula, which, they say, is enriched by their own emphases.

With growing religious polarization, this debate will only intensify.

Critical Thinking Questions

1. What is the rationale for the funding of religious schools by governments today?
2. Are there societal benefits to having religious schools?
3. Why not extend public funding to all religious schools in Ontario—and elsewhere?

The Canadian Situation

Affiliation with religious groups has been widespread in Canada since the founding of the country. Close ties have always been apparent between Canadians of British descent and the Church of England, Methodism, and Presbyterianism; between the French and the Roman Catholic Church; and between other ethnic groups and the churches of their homelands (Bramadat and Seljak, 2008). As noted earlier, Islam, Hindu, Sikh, and Buddhist growth in recent years has been directly related to the acceleration of immigration from Asia and the Middle East.

Less known is the fact that Catholicism has also been benefitting from the arrival of people from Africa, Latin America, and Asia, including China. In the first decade of the twenty-first century, for example, close to 500 000 people arrived in Canada as Catholics—higher than the number of Muslims, Hindus, or Sikhs, and a figure almost matched only by people with no religion (Bibby and Reid, 2016: 53). Immigration patterns underline the growing reality of Canada being characterized by people who are pro-religious, low religious, and not religious.

In the 2011 *National Household Survey*, Canadians were asked to indicate their religion and the religion of people living in their households. Based on this information, Statistics Canada reported that 76 percent of Canadians have a religious preference. Some 67 percent of the population identifies with Christian groups, led by Roman Catholicism (39 percent). Another 7 percent reported Other World Faith preferences, while the remaining 26 percent said they have no religion (Table 12.2).

In releasing the religion data, Statistics Canada (2013: 20-21) summarized the shift in religious identification by noting that Christianity remains the country's largest religion. Yet, consistent with changing immigration patterns, a growing proportion of the population is reporting religious affiliations other than Christian. Increases in the size of the Muslim, Hindu, Sikh, and Buddhist populations, for example, have added considerable diversity and vitality to the Canadian religious scene. An impediment to their ongoing growth, however, is the tendency of many of their offspring to socialize with and marry people outside their groups—a reality and challenge well known, for example, to Canada's Jewish community. Christian groups continue to hold a large numerical advantage and are frequently the primary beneficiaries of such intermarital "religious defection" (Bibby, 2002: 82–85). Perhaps the pattern is changing. Time will fill out the story.

TABLE 12.2 Religious Identification, Canada and the Provinces and Territories, 2011 (percentage)

	CANADA	BC	AB	SK	MB	ON	QC	NB	NS	PEI	NL	YT	NT	NU
Christian	67	45	60	72	69	65	82	84	76	85	93	45	66	86
Roman Catholic	39	15	24	30	26	31	75	50	33	43	36	18	39	24
United	6	5	8	13	11	8	<1	7	12	15	15	4	3	1
Anglican	5	5	4	6	6	6	1	7	11	4	25	10	15	50
Baptist	2	2	2	2	2	2	<1	10	9	4	<1	1	1	<1
Orthodox	2	1	1	1	1	2	2	<1	<1	<1	<1	<1	<1	<1
Lutheran	1	2	3	6	4	1	<1	<1	1	<1	<1	1	1	<1
Pentecostal	1	1	2	2	2	2	<1	2	1	1	7	2	2	5
Presbyterian	1	1	1	1	1	3	<1	1	3	7	<1	<1	3	<1
Other	9	12	15	12	16	10	3	6	6	10	10	10	3	6
Other faiths	7	10	6	<1	3	9	4	<1	<1	<1	<1	1	2	<1
Muslim	3	2	3	1	1	5	3	<1	<1	<1	<1	<1	<1	<1
Jewish	1	<1	<1	<1	1	2	1	<1	1	<1	<1	<1	<1	<1
Hindu	1	1	1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Buddhist	1	2	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1	<1
Sikh	1	5	1	<1	<1	1	<1	<1	<1	<1	<1	<1	<1	<1
Aboriginal Spirituality	<1	<1	<1	1	<1	<1	<1	<1	<1	<1	<1	1	1	<1
No religion	24	44	32	24	26	23	12	15	22	14	6	50	30	13

SOURCE: Computed from Statistics Canada 2011 *National Household Survey* (2013).

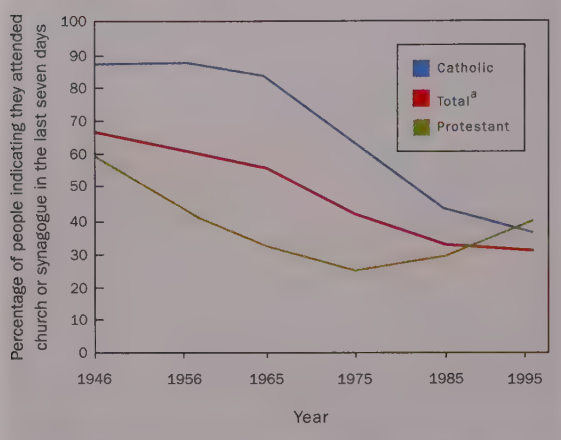
The Christian faith also continues to be pervasive in the United States, where the latest Gallup surveys show that about 70 percent of Americans identify with Christian groups, although those reporting they have no religion ("**Religious Nones**") is now close to 20 percent (Gallup, 2018). However, the numerically dominant groups in the United States are not the same as those in Canada. While one in two Canadians is Catholic, the same is true of only one in four Americans.

Furthermore, just one in ten Canadians identifies with conservative Protestant (evangelical) groups, in contrast to more than three in ten Americans. A tipoff on the difference is that some 40 percent of Americans claim that they are "born again" (Gallup, 2015); the term itself is not even particularly common in Canadian religious group circles, even among many of today's evangelicals. In fact, 31 percent of Canadians told us a decade or so ago that if they were in the presence of someone they didn't know who was "born again," their immediate reaction would be to feel uncomfortable. They'd better not wander too far into the United States.

When Canadians are asked about actual *membership* in religious groups, as opposed to mere affiliation or identification, more people—about 30 percent—claim to belong to religious groups, higher than membership in any other single voluntary group. About one in four attends services at least once a month, and roughly the same proportion of parents have school-aged children who go to Sunday schools or have similar kinds of religious instruction on a fairly frequent basis.

However, between approximately the 1940s and 2000, church attendance in Canada declined sharply, documented by Gallup poll findings summarized in Figure 12.1. Gallup had been asking Canadians if they attended a service "in the last seven days"—the phrasing of the inquiry adds sporadic attendees to those who claim they attend every week. Using such a measure, Gallup found that Protestant weekly attendance dropped from around 60 percent to about 30 percent between the 1940s and mid-1970s, rebounding to around 40 percent by the mid-1990s. The decline in Roman Catholic attendance appears to have started around 1965, dropping from roughly

FIGURE 12.1 Attendance at Religious Services, Canada, 1946–2001



[a]Total refers to all Canadians, regardless of faith.

SOURCES: Gallup Canada, Inc., surveys, 1946–1995. Gallup's national figure for 2001 was 31 percent and 26 percent for 2010; no Protestant–Catholic breakdowns are available. Reginald W. Bibby, *Beyond the Gods & Back: Religion's Rise and Demise and Why It Matters* (Lethbridge, AB: Project Canada Books, 2011).

85 percent to 40 percent by the late 1990s—led by low church-going in Quebec (for details, see Bibby, 2011b; Eagle, 2011).

No such dramatic decline in attendance has taken place in the United States: weekly attendance remained remarkably steady at around 40 percent from the 1930s, when polling began, through the early years of this century (Newport, Moore, and Saad, 1999). However, since about 2015, weekly attendance has slipped slightly to about 35 percent. Maybe it is just a blip, maybe not. Perhaps significantly, the percentage of people indicating they *never* attend now stands at around 30 percent. That's double what it was in 2000 (Gallup, 2018).

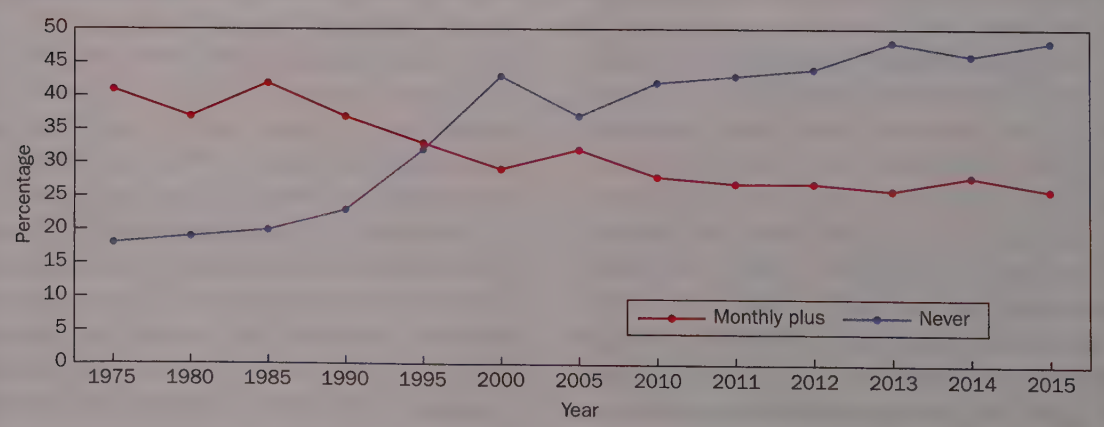
In Canada, the evidence suggests that attendance has levelled off in recent years (Figure 12.2). Some 30 percent of adults say they attend religious services monthly or more, while about 45 percent report they never attend. But both levels have changed little since about 2000.

What can be missed when we look only at how often people attend is the number of people who never show up. While the proportion of teenagers who were attending regularly changed little between 1984 and 2008 (23 percent to 21 percent), the segment who reported that they never attended services jumped from 28 to 47 percent.

Attendance patterns point to *religious polarization*. A fairly stable and durable segment of the population, comprised of both younger and older people, continue to value faith (the "pro-religious"). However, for another growing segment, faith is not important (the "not religious"). A significant proportion are somewhere in the middle (the "low religious") (Bibby, 2017: 51ff). Polarization, rather than secularization, seems to best capture the reality of these three important religious inclinations in Canada and, I think, pretty much everywhere else.

In a series of national surveys beginning in 2015, I have begun to explore the extent to which Canadians identify with these three inclinations. What I have found is that approximately 30 percent say that they

FIGURE 12.2 Attendance at Religious Services in Canada, 1975–2015



SOURCES: Reginald W. Bibby, *Project Canada Surveys*, 1975–1980; *General Social Surveys*, Statistics Canada, 1985–2015.

are embracing religion, 25 percent rejecting it, with the remaining 45 percent or so indicating they are taking a middle position (Bibby 2017: 65).

TIME FOR REVIEW

1. How do sociologists determine who is religious and who is not?
2. What are the main Canadian trends in participation in organized religion?
3. To what extent can you trace your religious inclinations or disinclinations to social sources?

THE SOURCES OF RELIGION

More than a few religious leaders over the years who have seen their best efforts to involve people come up empty have murmured, "There is only so much we can do." It's an insightful lament. The best programs and ministries in the world will not hit a responsive chord with everybody. Personal and societal factors also play critically important roles in determining who embraces religion and religious groups, and who does not.

Much of the early work in the scientific study of religion by people like Durkheim focused on preliterate cultures in which religion was pervasive. Everyone was religious, or so it seemed. Consequently, it's not surprising that observers gave considerable attention to the origin of religion itself, rather than examining variations in religious commitment.

However, individual differences in religion's importance in contemporary societies have called for explanations as to why some people are religious and others are not. The explanations tend to focus either on individuals or on social structure.

INDIVIDUAL-CENTRED EXPLANATIONS

At least three dominant "person-centred" explanations of religious commitment have emerged. See to what extent you see yourself and others in what the experts have had to say.

Reflection

The desire to comprehend reality is widespread among humans. In reflecting on the meaning of existence, people have commonly concluded that life has a supernatural, "transempirical" dimension. As Weber (1963 [1922]: 117) put it, religion is the product of an "inner compulsion to understand the world as a meaningful cosmos and take up a position toward it."

There is little doubt that Canadians, like people elsewhere, reflect on life's so-called big questions. Some 80 percent say they think about such issues as the origin and purpose of life, the meaning of suffering, and what happens after we die. Such questions take on particular urgency when people have to come to grips with such events as the attacks on September 11, 2001, or a devastating tsunami—or have to deal with the suicide of a friend or the loss of a parent. Still, although such times of reflection may provide religious groups with an opportunity to respond, reflection in itself does not usually lead to religious commitment and involvement. Fewer than one in three Canadians who often raise these "meaning" questions gives evidence of being religiously committed.

Socialization

A second person-centred explanation sees religious commitment as the product of learning—socialization factors that were the focus of Chapter 4. Freud (1962 [1928]) went so far as to say that religion is learned pretty much like the multiplication table. He may not have been exaggerating. I have never forgotten a high-school teacher, a former All-American football star who had also played for the Edmonton Eskimos, telling us that if we had grown up in India, we would all be Hindus. As Durkheim emphasized, personal religiosity has social origins and, consequently, will strongly reflect the social environments from which we come, beginning with our family.

Why is an Iraqi a Muslim, a Londoner Church of England, a Ute (as in Utah) a Mormon, a Quebecker a Catholic, an Indigenous person a blend of "native" spirituality and Catholicism? The answers are obvious. What is less clear is why some of those five people take their religion more seriously than the others do. To address the question, we probably would start by looking at the commitment level of their parents. Beyond family, we would expect that individuals who are devout have been exposed to additional social sources that are positive toward religion—friends, an ethnic group, an institution, a community or region, perhaps an entire society. Religion is very much a learned phenomenon.

Accommodation to social pressures, notably those of primary groups, seems to be a related source of religious group involvement. For example, one marriage partner may become more active in response to the hopes and expectations of the other, friends in response to friends, parents in response to having

young children, children in response to their parents. As John McEnroe of tennis fame once put it, "I can go to church once in a while, just for Mom." In small communities where religion is pervasive and normative, accommodation would be expected to be an important source of religious involvement.

It's important to keep in mind that socialization appears to be a *necessary* but not a *sufficient* cause of religiousness. That is to say, to the extent that Canadians are currently involved in religious groups, most had parents who also were involved. However, the fact that Canadians had parents who were involved does not ensure that their sons and daughters will follow suit. Although about eight in ten of today's weekly attendees had parents who attended weekly, only about three in ten Canadians whose fathers or mothers attended weekly have followed suit.

With a decreasing number of parents actively involved in religious groups in recent decades, fewer have been passing the experience of organized religion on to their children. For example, in 1975, some 35 percent of Canadians with school-aged children claimed that they and their children were attending services on a regular basis. By 2000, that figure had dropped to around 20 percent, with obvious negative implications for intergenerational involvement.

One of the strongest predictors of adult religiosity is childhood religious practice. When parents participate in religious observance with their children, the early socialization experience is often imprinted for life.

SOURCE: © iStockphoto.com/Sean Locke.

If religious involvement and commitment are to last a lifetime, they need to receive ongoing social support. Our surveys have found that the commitment level of a partner is strongly related both to personal involvement and to the importance placed on religion. In more than seven in ten cases, if one partner is a weekly attendee, so is the other. In fewer than three in ten cases does a person attend weekly or view religion as "very important" if a partner does not.

Deprivation

A third person-centred explanation of religious commitment is that the devout are drawn primarily from the ranks of society's deprived or disadvantaged. Religion provides them with compensation, sometimes in this life, sometimes later. The roots of such thinking, of course, are found in the work of thinkers like Marx and Freud.

The deprivation argument was developed more fully by the influential work of Glock and Stark (1965). They maintained that five types of deprivation are predominant in the rise and development of religious and secular movements: economic, social, organismic (that is, physical or mental), psychic, and ethical. The first three types of deprivation are self-explanatory. *Psychic deprivation* refers to the lack of a meaningful system of values, and *ethical deprivation* refers to having values that are in conflict with those dominant in a society.

Research in the 1970s and 1980s using objective indicators, such as income, health, and social relationships, did not find deprivation to be a particularly good predictor of broad religious participation in either the United States (Roof and Hoge, 1980) or Canada (Hobart, 1974). The learning perspective seems to have had far more applicability.

Since 2000, suicide bombing has received considerable world attention. Because such attacks are often religiously inspired, and because they are so violent, one might expect the attackers to be driven by extreme deprivation. And, in fact, some observers initially hypothesized that suicide bombers must be poor, unemployed, uneducated, unmarried, socially marginal young adults with little to lose. Analysts

assumed that people with such characteristics could be relatively easily convinced to exchange their lives of suffering in the here and now for promises of glory and martyrdom in the hereafter.

Research has demonstrated, however, that the deprivation argument does not generally hold in the case of suicide bombers. For example, sociologists Robert Brym and Bader Araj note in their study of suicide bombings in Israel, the West Bank, and Gaza from 2000 to 2005 that suicide bombers typically come from working-class and middle-class backgrounds, and they are generally better educated than the populations from which they are drawn. The suicide bombers who were responsible for the attacks of September 11, 2001, were all well-educated, middle-class men (Brym and Araj, 2006).

Studies of extreme forms of religious participation thus lead us to the same conclusion as studies of general populations: Deprivation does not appear to be systematically associated with religious commitment. This leads us to look for additional explanations of religious commitment.

STRUCTURE-CENTRED EXPLANATIONS

Suicide bombers hardly exist in social isolation. On the contrary, they typically are members of political and military groups found in the Middle East and, in the case of the Tamil Tigers, Sri Lanka. The groups to which they belong are in turn committed to getting rid of occupying forces, overthrowing existing regimes in their own countries or, in the case of a group like Hamas—the largest Palestinian resistance movement—obliterating Israel and creating an Islamic theocracy. Structural conditions clearly play an important role in such "religio-political" organizations coming into being and in individuals being recruited as members.

Such realities remind us that, in addition to personal characteristics of the reflection, socialization, and deprivation variety, religious commitment is strongly influenced by the broader national, regional, and group contexts in which people find themselves. You might immediately think of a theocracy, such as Iran, where the president and legislature are subject to clerical supervision. However, in virtually every society, Canada included, history and culture combine to create milieux that, to varying degrees, do or do not support religion.

Those proclivities often vary not only along national lines but also by the region in which people live and the groups of which they are a part. Historically, Canada's "Bible Belt" has been viewed as Alberta, when by every conceivable measure it probably has actually been the Atlantic region (Bibby, 1987, 2017; Hiller, 1976). Regardless, in the past, to have grown up in either of these two regions resulted in being exposed to environments that were far more "pro-religious" than people experienced in British Columbia. Social environments are important determinants of religious commitment and involvement.

Two early prominent Canadian sociologists, S. D. Clark (1948) and W. E. Mann (1962), argued that, historically, the emergence of sect-like groups in Canada, such as Baptists and Pentecostals, was tied to the existence of unstable conditions, which were produced by such factors as immigration and economic depression. With industrialization and increased prosperity and stability, some of these smaller, independent evangelical groups evolved into denominations—a process referred to as **denominationalism**.

A further example of the impact of societal factors on religion can be found in Quebec. Much of the drop-off in Roman Catholic attendance between 1965 and 1980 was related to the accelerated modernization of Quebec, including the church's relinquishing of much of its important role in education and social services to the provincial government (Beyer, 1993, 1997; Bibby and Stark 2017; Rouleau, 1977).

The climate that present-day societies provide for religion is the subject of considerable debate. Some observers maintain that increasing industrialization and postindustrialization contribute to a decline in the pervasiveness and importance of religion. This widely held **secularization thesis** has been prominent in the social sciences, largely because of the influence of Durkheim, Marx, and Freud. It's a framework that seems particularly appropriate to developments in much of Protestant Europe. It also is the dominant explanatory framework that academics and the media frequently use in making sense of religious developments in Canada (e.g., Bowen, 2004; Clarke and Macdonald, 2017; Dawson and Thiessen, 2014; Eagle, 2011; Valpy and Friesen, 2010). Yet it is clear that, to varying degrees, pro-religious inclinations persist everywhere in the world, along with no-religious and low-religious inclinations.

TABLE 12.3 Religious and Spiritual Self-Descriptions, Canada, the United States, and the United Kingdom, 2013

	CANADA	UNITED STATES	UNITED KINGDOM
Spiritual but not religious	41	33	27
Religious and spiritual	24	43	17
Religious but not spiritual	7	7	10
Neither spiritual nor religious	28	17	46
TOTALS	100	100	100

SOURCE: Reid and Bibby (2015). Copyright © Reginald Bibby.

Research that I carried out in collaboration with Angus Reid in December 2013 further documents the persistence of religion and spirituality in settings which, to varying degrees, have been viewed as highly secular (Table 12.3; Bibby and Reid, 2013). In three national surveys of Canada, the United States, and the United Kingdom involving samples of 1500 people each, we found that the dominant inclination of Canadians is to view themselves as "spiritual but not religious." In contrast, Americans are inclined to see themselves as "religious and spiritual," while residents of the United Kingdom lean toward "neither spiritual nor religious" self-images. Thanks to global polling, we can observe significant differences in religious inclinations right across the planet (Bibby, 2017). Clearly, national contexts are important sources of religious and non-religious propensities.

TIME FOR REVIEW

1. What are the main individual-centred explanations of religiosity?
2. What are the main structure-centred explanations of religiosity?
3. What is the evidence for and against the secularization thesis?

THE CONSEQUENCES OF RELIGION

In today's increasingly pragmatic world, Canadians face what seem like unlimited choices and limited resources. We need to sort out what is worth our time and what is not. Religion gets no exemption from such selective consumption.

Gone is the day when religious leaders could expect people to become involved in their groups because it's "their duty." Our 2005 national survey (Bibby, n.d.: 2) found that 61 percent of Canadians believed that their parents "felt they were supposed to go to church." Eighty-seven percent of respondents maintained that, these days, "people who attend religious services should not go because they feel they have to but because they find it to be worthwhile."

Is religion "worthwhile"? On balance, does it enhance personal and social life?

PERSONAL CONSEQUENCES

Research findings on religion and what we might refer to generally as "mental health" are contradictory. Important early work carried out by social psychologist Milton Rokeach (1965: 2) led him to conclude, "We have found that people with formal religious affiliation are more anxious [than others are]. Believers, compared with non-believers, complain more often of working under great tension, sleeping fitfully, and similar symptoms." Yet research dating back to the 1970s has consistently found a negative relationship between religious commitment and *anomie*—valuelessness and rootlessness (Lee and Clyde, 1974). Over the years, researchers have argued that involvement in groups, such as sects and cults, has contributed to upward mobility, providing an improved self-image and hope in the face of economic and social deprivation (e.g., Johnson, 1961; Whyte, 1966). During the 1970s and 1980s, considerable literature emerged warning against the psychological and emotional damage that could be inflicted by the alleged "brainwashing" of cults (Dawson, 2006: 95ff).

Canadians of every social and demographic stripe tend to acknowledge that they have spiritual needs.
SOURCE: © ZakiraZ/Shutterstock.

Gale Frankel and W. E. Hewitt (1994) found a positive relationship between religious group involvement and good mental health. Research into the charismatic "Toronto Blessing" congregation maintained that even physical healing occasionally occurs (Poloma and Hoelter, 1998). National denominational surveys document that people who are highly involved in religious groups say their involvement significantly enriches their lives (Bibby, 2017; Newport, 2007).

It thus seems that some forms of religiosity are connected with well-being, while others are not. My own analyses of our survey data dating back to 2000 suggest that, overall, Canadians who exhibit religious commitment are slightly more inclined than others to claim a high level of happiness and to express a high level of enjoyment of partners, family, and friends. However, there are only small differences between "the pro-religious, low religious, and not religious" when it comes to things like self-esteem and personal concerns (Bibby, 2017:92-96); Figure 12.3).

In short, religious commitment by itself appears to have a fairly limited influence on valued personal characteristics. Moreover, it is often less important than such factors as age, education, and employment in predicting personal well-being.

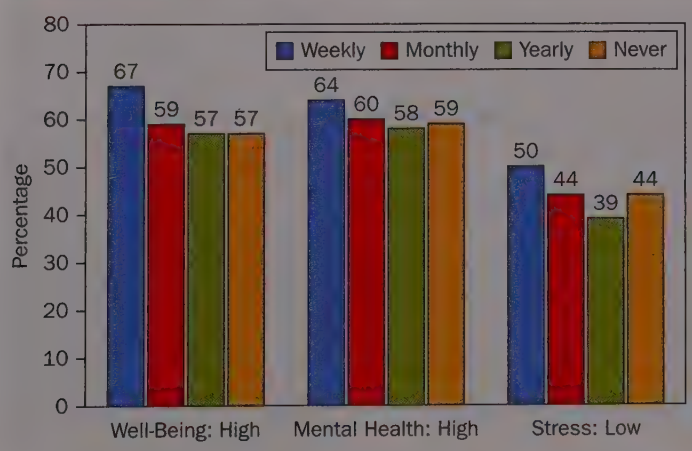
A word of caution: This "no difference" finding does not mean that faith is not adding something to the lives of people who value faith. Rather, in light of the high levels of happiness and contentment reported by Canadians generally, it suggests that large numbers of other people are finding alternative pathways to personal well-being. Religion is having an impact—but not necessarily a unique impact.

INTERPERSONAL CONSEQUENCES

One of the first attempts to examine the relationship between religious commitment and compassion was carried out by Clifford Kirkpatrick in Minnesota in 1949. He found that religiously committed people were somewhat less humanitarian in their outlook than were others.

Twenty years later, Rokeach (1969), drawing on U.S. national data, observed that religious commitment was *negatively* related to social compassion; in the case of Roman Catholics, no relationship—positive or negative—existed. Rokeach concluded that "the

FIGURE 12.3 Personal Well-Being and Religious Service Attendance, 2015



SOURCE: Computed from *General Social Survey*, Statistics Canada, 2015.

results seem compatible with the hypothesis that religious values serve more as standards for condemning others . . . than as standards to judge oneself by or to guide one's own conduct" (Rokeach, 1969: 35).

These findings have not gone unchallenged. Research conducted on specific religious groups and in certain locales has found a positive relationship between commitment and compassion. In a more immediate relational sense, Wilcox (1998) has found that, although conservative Protestant parents were more likely than others were to use corporal punishment in disciplining their children, they also are more likely than other parents were to praise and hug their children. Extensive research on religion and racial prejudice, such as Smith's (1999) look at anti-Semitism and "the Religious Right," has yielded contradictory results.

In 2015, we examined acts of compassion in Canada by asking Canadians if, in the past month, they had (a) helped a stranger, (b) donated money to a charity, or (c) volunteered time to an organization. What we found is that "the pro-religious," "low religious," and "not religious" were equally likely to claim they helped a stranger in the past month. However, the pro-religious were considerably more likely than others to report that, during the same period, they had both donated money to a charity and volunteered time to an organization (Bibby, 2017:117). This question has been asked in surveys all over the world. A consistent pattern emerges: People who are highly religious are more likely than others to have engaged in each of the three kinds of behaviour (Smith and Stark, 2004).

With respect to attitudes to interpersonal relationships, religiously committed people, both younger and older, are somewhat more likely to place a high value on certain interpersonal characteristics that make for civility. Those traits include honesty, politeness, forgiveness, and concern for others (Bibby, 2009, 2012, 2017).

There is, however, one area in which religion continues to speak with a particularly loud if not unique voice—the area of personal morality, notably sexuality. With few exceptions and with varying degrees of explicitness, religious groups tend to oppose "moral innovation." Examples include opposition to sex outside of marriage, homosexuality, the availability of legal abortion, and the acceptability of gender diversity.

That said, considerable differences exist in the positions that religious groups take on these varied issues, as well as in the inclination of average people who identify with these groups to "follow the party line." Generally speaking, evangelical Protestants, Roman Catholics, and Muslims are the most likely to be opposed to variation in the sexual realm. Quebec Catholics, however, tend to be among the most receptive, with their openness exceeded only by Canadians with no religion.

And this just in: Millennial Canadians who "definitely" believe in God join other adults and teens in being more inclined than atheist Millennials to place a high value on forgiveness and concern for others, and to be just as likely to highly value honesty (Bibby, 2009, 2017:110–14 ; see Table 12.4). That's not to say that believers necessarily come through behaviourally, or that there is no social compassion among atheists.

TABLE 12.4 Select Values and Attitudes of Theist and Atheist Millennials (percentage)

		THEISTS %	ATHEISTS %
Very Important	Honesty	82	83
	Forgiveness	72	34
	Concern for others	62	54
Approve of	Premarital sex among individuals under 18	30	75
	Same-sex marriage	49	92
	Availability of a legal abortion when a woman's health is seriously endangered	69	82

SOURCE: Derived from Angus Reid and Reginald W. Bibby, *2015 Religion Survey*. Vancouver: Angus Reid Institute.

However, the findings suggest that belief in God is one, if only one, potential source of civility.

The social downside of Millennials being believers is that they are considerably more likely than atheists to hold negative views of premarital sex, same-sex marriage, and the availability of legal abortion, as shown in Table 12.4. Millennials who are active religious service attenders are also less likely than infrequent and never attenders (47 percent versus 67 percent) to maintain that trans people should be able to use the public washroom of their choice (Bibby, Thiessen, and Bailey, 2019).

In light of anticipated immigration patterns, the interpersonal implications of being pro-religious versus no religious point to the potential for value conflict.

SOCIETAL CONSEQUENCES

So far, we've looked at some personal and interpersonal consequences of religious involvement and commitment. But what about the net consequences for societies more generally? On balance, is religion a plus or a minus—or simply irrelevant?

A cursory look at the historical evidence in Canada provides mixed reviews. Many would argue that religion has played and continues to play an important role in helping immigrants adjust to life in Canada, providing resources in the form of both personal faith and social support. Others would quickly add that many religious groups, notably the United, Anglican, and Roman Catholic churches, along with the Jewish community, have played important roles in helping to establish a just society, where diversity and inclusiveness today are valued on a level matched by few countries anywhere in the world. In addition, the claim can be made that religious groups are among the few organizations in Canada that explicitly attempt to instill morality, ethics, and compassion, thereby making an important contribution to civility.

Those things said, you hardly need me to remind you that other views of religious groups are not as charitable. For example:

- In the course of taking their place in the country, a number of Christian groups were anything but just and compassionate in their treatment of Indigenous peoples, including their complicity with government goals in running residential schools.
- The "Quiet Revolution" in Quebec in the 1960s that saw the province take over many services from the Catholic Church was not accompanied by an overt revolt. However, covertly, large numbers of Catholics had found the church to be highly oppressive and began to stay away (Graham, 1990: 114ff).
- A variety of highly publicized sexual abuse cases that spanned the country—from the Mount Cashel orphanage in Newfoundland and Labrador, through the "Orphans of Duplessis" in Quebec and the Christian Brothers in Ontario, to the Catholic Diocese in Prince Rupert, British Columbia—left many Canadians stunned and disenchanted with organized religion (see Bibby, 1993: 68ff).
- Catholics, Jews, and Muslims, along with smaller religious bodies, including Mennonites, Hutterites, Jehovah's Witnesses, Scientologists, and Doukhobors, have been on the receiving end of hostility and discrimination at various points in our nation's history.

Clearly the evidence to date is mixed. Religion adds to the quality of life in the country and sometimes subtracts. What does seem to contribute to a fairly unique religious situation in Canada is the entrenchment of pluralism. Religious groups here have to play by the rules of diversity, being respectful of one another—not making excessive claims of uniqueness, not being overly aggressive in raiding each other's ranks, and not being exploitive of vulnerable categories, such as immigrants, children, and seniors. And they have to respect individual rights, in keeping with the Charter of Rights.

So contained, religious organizations that might otherwise have a detrimental effect on collective life in Canada are kept in check. Unlike the United States, we have had no effective national "Moral Majority." The same-sex marriage issue was not allowed to become an unrestrained and uncivil debate. This is not a country where Christians can call other people "heathen" or where Christians can be ridiculed as "bigoted Bible-thumpers." This is not a country where Muslims can call for the heads and hands of artists who draw caricatures of Mohammed or a place where artists can insult and incite Muslims. Some groups don't always like the rules, but that's the way the religion game is played in Canada. So contained, religion seems positioned to contribute positively to our individual and collective life (see the Critical Sociology: Religion and the Residential Schools feature).

More than half a century ago, Peter Berger (1961) noted that Durkheim's assertion that religion functions primarily to integrate societies seemed to offer

Critical Sociology — RELIGION AND THE RESIDENTIAL SCHOOLS

For over a century, the central goals of of Canada's Aboriginal policy were to eliminate Indigenous government; ignore Indigenous rights; terminate treaties; and, through a process of assimilation, cause Indigenous peoples to cease to exist as distinct legal, social, cultural, religious, and racial entities. Canada outlawed Indigenous spiritual practices, jailed Indigenous spiritual leaders, and confiscated sacred objects.

The federal government has estimated that at least 150 000 First Nation, Métis, and Inuit students passed through the residential system between the 1980s and late 1990s. Roman Catholic, Anglican, United, Methodist, and Presbyterian churches were the major denominations involved in the administration of the residential school system.

The system was based on an assumption that European civilization and Christian religions were superior to Indigenous culture, which was seen as savage and brutal. The missionaries who ran the schools played prominent roles in church-led campaigns to ban Indigenous ritual and marriage practices.

Indigenous children were taught to reject the spiritual ways of their parents and ancestors in favour of the religions that predominated among settlers. As their traditional ways of worshipping were disparaged and rejected, so too were the children devalued. The impact of such treatment was amplified by federal laws and policies that banned traditional Indigenous spiritual practices in the children's communities for much of the residential school era.

Hostility to Indigenous cultural and spiritual practice continued well into the twentieth century. In 1947, Roman Catholic official J. O. Plourde told a federal parliamentary committee that he could see no reason why the residential schools "should foster aboriginal beliefs." United Church official George Dorey told the same committee that he questioned whether there was such a thing as "native religion."

Although Indigenous peoples and cultures have been badly damaged, they persist. Indigenous people have refused to surrender their identity. Most Canadians recognize that the time has arrived to commit to a process of reconciliation. By establishing a new and respectful relationship, we restore what must be restored, repair what must be repaired, and return what must be returned.

Critical Thinking Questions

1. Why were religious groups tasked by the government to run residential schools?
2. Why have religious groups apologized for running residential schools?
3. What is the current posture of religious groups—and Canadians more generally—toward Indigenous expressions of spirituality?

SOURCES: Michael Valpy, "Why the Global Rage Hasn't Engulfed Canada: Multiculturalism and Media Likely Muted Protests." *The Globe and Mail*, 08 February 2006. Reprinted with permission from *The Globe and Mail* via iCopyright. License #3.8425-44168; Truth and Reconciliation Commission (2015: 1–6, 220).

a good description of religion in the United States. Religion, or at least the mainline segment of organized Christianity that historically has embraced the largest number of members, has tended to endorse American culture rather than to challenge it, to endorse the status quo rather than call for social transformation. So intense has been the bond between religion and American life that for some time, observers such as Robert Bellah (1967) have described the phenomenon as American **civil religion**. In an influential book, Will Herberg (1960: 75) put it this way:

> Americans, by and large, do have their "common religion" and that "religion" is the system familiarly known as the American Way of Life. . . . By every realistic criterion the American Way of Life is the operative faith of the American people. . . . To be a Protestant, a Catholic, or a Jew are today the alternative ways of being an American.

Canada, committed as it is to diversity and a downplaying of overt nationalism—except for the occasional international hockey championship—has no such civil religion. As William Stahl (1986: 16) put it, "Other than a few bands and firecrackers, Confederation was not attended by much emotional outpouring." And religious groups have done little to add fervour to our rather lifeless expressions of nationalism. Still, Harold Fallding (1978) reminds us that, historically, "Canadian Protestant churches have reflected the British position of legitimizing authority through supporting government, offering prayers, for example, for its success in securing order

and justice." The fusion of Catholicism with life in Quebec, Anglicanism with the status quo in southern Ontario, and conservative Protestantism with political and social life in Alberta are obvious examples.

On occasion, of course, religion has challenged North American culture. The civil rights movement in the United States received much of its leadership and impetus from African American evangelical churches. American Catholic bishops and the National Council of Churches have frequently spoken out against perceived injustices, including poverty, racism, and war. Jerry Falwell's "Moral Majority," which peaked in the 1980s, contributed to a vocal "Christian Right" committed to altering the nature of American life by influencing the country's major institutions.

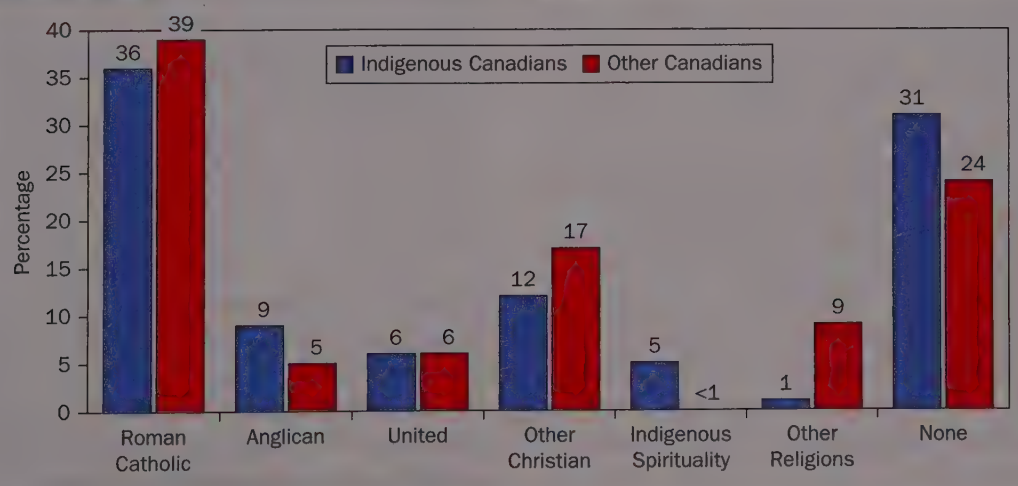
In Canada, religious groups have had and continue to have the freedom to address governments. To varying degrees, they have availed themselves of the opportunity—and responsibility. Protestant churches, for example, have received mixed reviews for their concern about the plight of Jews during World War II; some churches and individuals were silent, while others were not (Davies and Nefsky, 1997). In the 1940s, a radical effort was made by the Roman Catholic Church to support striking workers, a preview of the ongoing inclination of the Canadian Conference of Catholic Bishops to support average Canadians and to be vocal in criticizing the profit orientation of the nation's economy. Protestant groups, often led by the United Church, along with a growing number of ecumenical consortia and initiatives, and, more recently, evangelical churches, have been making concerted efforts to bring about social change (Airhart, 2014: Crysdale, 1961; Lewis, 1993; Stiller, 1997). Religious coalitions, such as the national Citizens for Public Justice and, in Ontario, the broad-based Interfaith Social Assistance Reform Coalition (ISARC), have been among those calling for greater and more effective attention directed toward social programs, the environment, and Indigenous issues.

It is important to note that locally, nationally, and globally, religion clearly has the potential both to bring people together and to tear them apart. Religion's role in contributing to conflict, past, and present, is well known. Globally, what seems like never-ending conflict in the Middle East and elsewhere provides contemporary examples of religion playing a role in contributing to divisiveness. At times I—along with many others—wonder about the long-term outcome of what seems to be a deepening chasm between the West and the Muslim world.

Yet in the aftermath of both the September 11, 2001, attacks and the fury over the publishing of the Mohammed caricatures in 2006, significant numbers of Muslim leaders were among the first to decry violence and bloodshed, and to call on people worldwide to find peaceful means of resolving their differences. Therein lies the paradox of religion: It can both destroy and enrich social life.

Despite the experience Indigenous peoples have had with residential schools and their legacy, a solid majority (63 percent) continue to identify with Christian groups, led by Roman Catholics (see Figure 12.4). Only about 5 percent (some 63 000)

FIGURE 12.4 Religious Identification of Indigenous and Other Canadians



SOURCE: Computed from Statistics Canada, *National Household Survey*, 2011.

are "affiliated with traditional Aboriginal spirituality" (Statistics Canada, 2013). The survey items, however, need to be refined to capture the extent to which religion and spirituality coexist for many Indigenous individuals. For example, a decade ago, our national survey of 500 teenagers in Band-run schools (Bibby, Penner, and Fox, 2009) found that

- 47 percent valued Aboriginal spirituality and Christianity
- 29 percent valued Aboriginal spirituality but not Christianity
- 5 percent valued Christianity but not Aboriginal spirituality
- most of the remaining 19 percent valued neither.

Clearly, "the religious legacy" of the residential school experience is complex and needs ongoing and improved research. On the surface, what perhaps is somewhat surprising is the fact that, despite everything, large numbers of Indigenous Canadians have not abandoned Christianity.

TIME FOR REVIEW

1. What does research tell us about the impact of religion on personal well-being?
2. In Canada, is religion potentially a source of social well-being?
3. With increasing numbers of Catholics, Muslims, and people unaffiliated with any religion coming to Canada, what are the implications—positive and negative—for interpersonal life in the country?

THE FUTURE OF RELIGION

One thing is certain: Religion is not going to disappear. Proponents of the secularization thesis expected religion to be replaced by science and reason as societies evolved. Opponents of the secularization thesis countered that humans have needs—notably the need to come to grips with death—that only religion can satisfy. It is noteworthy that one unique contribution religion brings to the Canadian religious and spiritual marketplace is hope in the face of death (Bibby, 2017:177-78). Consequently, even if secularization leads to the demise of some religious groups, new providers are bound to appear. Ironically, rather than signalling the end of religion, secularization stimulates innovation (Stark and Bainbridge, 1985).

Emerging religious forms will include sects—groups that break away from established religions, and new religious movements (**cults**) with origins outside of older religions. From this point of view, shifts in the overall "religious economy" over time involve "the rising and falling fortunes of religious firms, not the rise and fall of religion per se" (Finke and Stark, 1992: 275).

All that said, it also is clear that significant numbers of people worldwide, including Canada, are taking a pass on religion. In 1971, some 1 in 25 Canadians said they had no religion. Today that figure stands at about 1 in 4.

As we glance around the globe, there is no need to spend time debating religion's future with the wise social scientists of old. Religion is simply everywhere, and will continue to be everywhere (see, for example, Allen, 2009; Cox, 2009; Mead, 2010; Reynolds, 2011; Stark 2015). The Pew Research Center (2015) projects that, for starters, by 2050 the world's population of more than 9 billion people will include close to 3 billion Christians and 3 billion Muslims. But, as in the past, the world will not lack for good numbers of people who are not "into" religion. Pew estimates the figure for those "unaffiliated" will exceed 1 billion (see Table 12.5).

These numbers have critical implications for the future of religion in Canada. Statistics Canada has been reminding us now for a number of years that we are in the midst of a new era of accelerated immigration. Collectively, our birth rate has not been keeping up with our death rate. As a result, the math is simple: If our population size is going to remain stable, let alone increase, we need to experience an increase in net international migration.

Consequently, there is no single factor that is going to be more important in determining the future of life in Canada than immigration, and that includes the country's religious landscape (Bibby 2017: 217; Reimer and Hiemstra, 2018).

Pew maintains that, by 2050, about 75 percent of Canadians will be identifying with a religious group. The unaffiliated will also continue to be significant in size, coming in at around 25 percent (see Table 12.6).

In trying to make sense of the future of religion in Canada, I recently have suggested that we can anticipate some central features (Bibby 2017: 222–24). It seems to me that, in the end, things come down to this. In Canada and everywhere in the world, people variously embrace religion, reject religion, or take something of a middle position. As Canada enters into

TABLE 12.5 The World's Largest Religions, 2010 and 2050

	2010 POPULATION		2050 PROJECTION	
	N	%	N	%
World Totals	6.9 billion	100.0	9.3 billion	100.0
Christians	2.2 billion	31.4	2.9 billion	31.4
Muslims	1.6 billion	23.2	2.8 billion	29.7
Unaffiliated	1.1 billion	16.4	1.2 billion	13.2
Hindus	1.0 billion	15.0	1.4 billion	14.9
Buddhists	488 million	7.1	486 million	5.2
Folk Religions	405 million	5.9	449 million	4.8
Sikhs	25 million	0.3	25 million	0.3
Jews	14 million	0.2	16 million	0.2
Other	33 million	0.5	36 million	0.4

SOURCE: Pew Research Center (2015).

TABLE 12.6 Canada's Major Religious Groups, 2010 and 2050 (thousands)

	2010		2050	
	000S	%	000S	%
Christians	23 470	69	24 640	60
Unaffiliated	8 050	24	10 470	26
Muslims	710	2	2 260	6
Hindus	470	1	1 070	3
Buddhists	280	1	600	1
Jews	350	1	560	1
Other	690	2	1 350	3

SOURCE: Pew Research Center (2015).

a time of accelerated immigration, the configurations are going to be in motion. Christians will be numerically dominant, but their lead is going to decrease. Those who reject religion will continue to be significant in number, as will people in the religious middle. Of considerable importance, currently, people arriving in Canada are considerably more likely to be pro-religious, active religious service attenders than are people born in Canada (Bibby, 2017: 218–19).

The evolving situation will bring with it two central questions. First, in Canada and around the world, can the growing number of Christians, Muslims, and people with no religion coexist? Can they live out their different expressions of religious faith—or no faith at all—in a way that makes for positive individual and collective life?

Second, an ongoing question is what are the implications and consequences for the personal and collective life of individuals variously embracing, rejecting, and taking a middle position on religion?

I have summed up things this way: The gods are resilient; they aren't going away. But those who choose to ignore the gods also aren't going away. And the people in the middle are also always going to be with us.

Therefore, the big challenge of this century and in centuries to follow is to figure out how all these different postures toward faith can be made to work in such a way as to contribute to optimum living. Put succinctly, the great question of our time is how the presence and absence of faith can coexist for the betterment of us all—now that it is clear that both inclinations will always be with us.

SUMMARY

1. **How do sociologists study religion?**
   Religion explores reality beyond what can be known empirically, but sociology explores the empirical aspects of religious belief and practice using social scientific methods, including surveys, comparative-historical analyses, systematic observation, and so on.

2. **Who were the early key sociological theorists of religion?**
   The sociology of religion has been strongly influenced by the theoretical contributions of Marx, who stressed the compensatory role of religion in the face of economic deprivation; Durkheim, who emphasized both the social origin of religion and its important social cohesive function; and Weber, who gave considerable attention to the relationship between ideas and behaviour.

3. **What does religious commitment mean?**
   Personal religious commitment includes four dimensions: belief, practice, experience, and knowledge. Personal commitment is created and sustained by collective religiosity.

4. **What is the market model of religion?**
   The market model sees religion as a product that exists to the degree that it serves the interests and needs of people. In this view, religious groups function like companies that compete to respond to market demand by offering products that are intended to increase their market share.

5. **What are the sources of religious commitment?**
   Sociologists have invoked individual and structural factors to explain variations in the levels of individual religious commitment. Reflection, socialization, and deprivation have been prominent among the individual explanations, while the dominant structural explanation has been the secularization thesis.

6. **What is the impact of religion on individuals and societies?**
   Religion appears to be one of many paths leading to personal and social well-being. It, does however, speak fairly uniquely to the universal question of life after death. Although religion can be socially disruptive, Canada's emphasis on social and cultural diversity puts limits on how religion can be expressed, thereby optimizing the possibility of religions contributing positively to social and collective life.

7. **What is the future of religion in Canada?**
   In Canada and elsewhere, people will continue to variously embrace religion, reject it, and take a middle position. As a result, the important question in all settings is how people with the three inclinations can coexist for the betterment of all.

QUESTIONS TO CONSIDER

1. Which of the three early theorists of religion—Durkheim, Marx, or Weber—do you find to be the most helpful in understanding religion? Why?
2. Does religion make any difference in the lives of the people you know? How do you think life in Canada would be different if organized religion disappeared?
3. Imagine that you are serving as a consultant to a major Canadian religious group. What might you suggest it consider doing to (a) keep the people it has, (b) gain the interest of people who are not actively involved, and (c) respond to the accelerated level of immigration?
4. In addition to immigration, what factors do you think might influence the future inclinations of Canadians to be pro-religious, low religious, and not religious?

GLOSSARY

Civil religion (p. 286) refers to the tendency for nationalistic emphases to be nurtured by a society's religions, so that a culture takes on many religious-like characteristics. The term is most often used with respect to the United States.

Collective conscience (p. 267) is Durkheim's term, referring to awareness that a group is more than the sum of its individual members and the belief that such awareness is experienced as the supernatural.

Collective religiosity (p. 272) is religious commitment as manifested in and through religious groups; it is key to the creation and sustenance of personal religiosity.

Cults (p. 288) are religious groups that have their origins outside older religions.

Denominationalism (p. 281) refers to the tendency for a wide variety of Protestant religious groups to come into being, seemingly reflecting variations not only in theology but also—and perhaps primarily—in social characteristics.

Dimensions of religiosity (p. 270) are the various facets of religious commitment, including belief, experience, practice, and knowledge.

Humanist perspectives (p. 270) are systems of meaning that are used to interpret the world but do not have a supernatural referent.

The **market model** (p. 272) for understanding religion holds that religious groups behave like companies competing for market share.

Monotheism (p. 269) is belief in one god.

Personal religiosity (p. 270) is the level of religious commitment characterizing an individual.

According to Durkheim, things that are **profane** (p. 268) are deemed *not* to warrant profound respect.

Religions (p. 270) are systems of meaning for interpreting the world that have a supernatural referent.

Religious Nones (p. 277) is a term used to describe the growing number of people who indicate that they have "no religion."

Religious polarization (p. 275) is the growing tendency of some people in a given setting to embrace religion and the tendency of others to reject it or take something of a middle position.

According to Durkheim, things that are **sacred** (p. 268) are deemed to warrant profound respect.

Sects (p. 272) are groups that have broken away from established religions.

The **secularization thesis** (p. 281) holds that religion as it has been traditionally known is continually declining, resulting in a loss of religious authority, societally and individually, as well as changes in religious organizations themselves.

PART 5

CHANGE AND CONFLICT

CHAPTER 13

DEVIANCE AND CRIME

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Distinguish crime from deviance and recognize that the seriousness of a criminal act is not intrinsic to the act itself but is a function of the societal reaction to it, which varies over time and place.
- Appreciate the limitations of official crime statistics, which do not include many crimes and are influenced by a variety of social factors.
- Identify the factors that make crime and deviance more prevalent in some categories of the population than in others.
- Compare and contrast numerous, often competing, explanations of deviant and criminal behaviour and societal responses to it.

INTRODUCTION

For much of our everyday lives, we take for granted that our routine activities will follow an orderly and predictable pattern. When we drive on a North American highway, we can rely on the fact that others will also be driving on the right-hand side of the road and will stop their vehicles at a red light. If they did not, the result would be chaos. Likewise, when we want our morning cup of coffee, we expect to join the lineup at Tim Hortons—and we don't appreciate other patrons pushing in front of us. Everyday life depends on people following agreed-on rules, however unconsciously.

A good part of the sociological enterprise is concerned with explaining the orderliness of human behaviour (Giddens, 1991; Robertson, 1989). And yet just a moment's reflection will tell you that human behaviour is not always predictable, that the rules are not always obeyed, and that we don't always live up to other people's expectations. People do jump the queue at Tim Hortons and break the speed limit on the highway. They also do much worse things; they steal, cheat, rape, and murder. How and why people break rules—why they deviate from the expectations of other people—is an important part of the subject matter of the sociology of crime and deviance.

This 1936 movie poster illustrates how relative deviance is. The movie suggests that people go insane after smoking marijuana.
SOURCE: *Reefer Madness*, 1936. Directed by Louis Gasnier.

We have a complicated relationship with crime and deviance. On the one hand, survey after survey confirms that deviance—particularly violent interpersonal crime—is one of the major discontents of our society. Many people, especially seniors, live in fear of crime. On the other hand, crime and deviance fascinate us. Crime stories constitute an important part of our entertainment culture. No new TV season would be complete without its roster of programs like *Murdock Mysteries* and *Law and Order* or its dose of "Nordic noir," such as *The Killing* or *The Bridge*. Movies, books, and newspapers also rely on crime and deviance for much of their content. In fact, this dependency seems to be increasing—crime coverage in the mass media has expanded substantially in recent years (Greer and Reiner, 2012; Sacco, 2005: 80).

Real-life crime stories are no less likely to grip the public imagination. The double murder of Toronto power couple, Barry and Honey Sherman in December 2017 is one such case. Strangled by persons unknown, their bodies, bound and gagged, found by the indoor swimming pool, and with no immediate suspects, rapidly turned a local crime story into an international one. Likewise, few fictional representations can compare with the courtroom drama of Amanda Knox, the American student in Italy convicted, acquitted, re-tried, re-convicted, and definitively acquitted of the killing of her British female roommate in October 2011. Her various trials attracted a global audience, captivated by a story of sexual intrigue involving attractive female protagonists, prosecutorial incompetence, and unreliable testimony and evidence. Her story has been told and retold in several books (including her own), a Netfix documentary, and made-for-TV movies, and is the subject of a major international film. In this case, as with others, the line between fictional crime and factual crime has become blurred (Greer and Reiner, 2012). The very ambiguity of our feelings about crime and deviance makes it fertile ground for exercising the sociological imagination.

CONCEPTIONS OF CRIME AND DEVIANCE

CRIME AND DEVIANCE AS NORM-VIOLATING BEHAVIOUR

If I were to ask you what you consider examples of crime or deviance, you would probably include such acts as murder, rape, bank robbery, and theft, perhaps

the occasional hockey riot in Vancouver, and student disorder and protest against higher tuition fees in Montreal. You might also mention some kinds of drug use, some types of sexual behaviour, drunk driving, cyberbullying, and a host of other acts of seemingly lesser importance: speeding on the highway, talking in theatres, jaywalking, and cigarette smoking in restricted areas.

These acts are all examples of rule-breaking behaviour. One way of conceptualizing crime or deviance is to emphasize its rule-breaking qualities, focusing particular on its behavioural dimensions. Sociologists refer to the rules in question as **norms**, or generally accepted ways of doings things. The most important norms are written *laws*, or norms that the state enforces. **Deviance** involves breaking a norm. **Crime** involves breaking a law.

All human societies have norms about appropriate behaviour. Some norms have wide scope, applying to more or less everybody in the community—prescriptions against murder and armed robbery, for instance. Other norms may apply only to particular subgroups of society. For example, there are prohibitions on the behaviours of adolescents that do not apply to adults. They involve some types of sexual behaviour, for example, and alcohol use. In the United States, some jurisdictions have laws prohibiting young people from being in a public place after a certain time in the evening. Such curfew regulations (which some people would like to see introduced in Canada) do not apply to adults. Normative behaviour can be gendered, too. When I first visited Canada from the United Kingdom in 1970, I was surprised to find that women had to have a male escort if they wanted to enter a bar in Ontario.

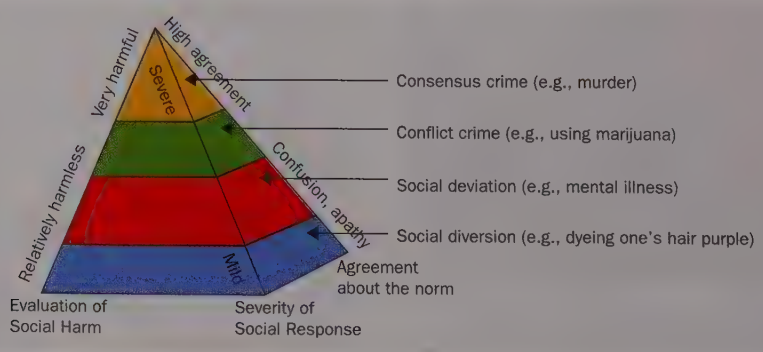
Norms are enforced in many ways. The most important of them are laws, which are regulated by a **criminal justice system** that includes police, courts, prisons, and so on. The criminal justice system responds to law violators in legally prescribed ways, with the most grievous offences evoking the most severe sanctions. In Canada and all of Western Europe, life imprisonment is the most severe sanction afforded by the criminal code. In other parts of the world—the United States and China, for instance—capital punishment (the death penalty) remains the ultimate sanction.

Many of the norms that control everyday life do not require legal intervention. They are more likely to be enforced informally. People who insist on talking in a theatre are liable to be admonished by the people around them. Communal pressure is usually enough to regulate such behaviour.

How might we distinguish between diverse kinds of rule-breaking behaviour? One answer is provided by John Hagan (1991), who suggests that norm violations can be differentiated by how serious they are, as gauged by three different measures of seriousness: (1) how harmful the act in question is deemed to be, (2) how much agreement there is that the behaviour in question is wrong, and (3) the severity of the sanction, or punishment, imposed on the behaviour (see Figure 13.1).

We have the sense that more harm is inflicted by, say, physical violence than soft drug use. The brutal murder of a small child grievously affects not just the victim but also her family, friends, and neighbours. In some high-profile cases—the alleged murder and dismemberment of a Chinese international student by sometime porn actor Luka Magnotta in 2012, for instance—the broader society shares a communal sense of horror and outrage. Sometimes the grief and condemnation is global: Recall the reaction to the

FIGURE 13.1 Types of Deviance and Crime



SOURCE: John Hagan (1991). Reprinted with permission from John Hagan.

mass killing of 17 students and staff members (and injuring of 17 others) at Marjory Stoneman Douglas High School in Parkland, Florida, by a lone gunman in February 2018.

Contrast these examples with prostitution. Exchanging sex for money is sometimes illegal. It is legal where it is believed to be relatively harmless. Whereas most of us would agree that deliberately hurting somebody by physically assaulting him or her with a weapon is morally wrong, there is significant debate about how inherently wrong or harmful prostitution is. We punish acts that we regard as very harmful and wrong more severely than those deemed less harmful and wrong. Convicted prostitutes are less likely to receive prison terms than those convicted of armed bank robbery.

Hagan employs his conception of "seriousness" to identify different kinds of deviance. He designates a small group of offences as **consensus crime**—acts that are felt to be very harmful and wrong, and for which the harshest criminal sanctions are reserved. What he calls consensus crimes are referred to in legal philosophy as crimes *mala in se*—crimes that are evil in themselves. Homicide, attempted homicide, violent assault with a weapon, violent sexual assault, armed robbery, kidnapping, and theft are all examples of crimes *mala in se*.

A second group of illegal behaviours is what Hagan calls **conflict crime**. Here, "conflict" means not that they involve acts of interpersonal violence or aggression, but that members of the community disagree over whether the behaviours in question are harmful, wrong, or deserving of severe criminal sanction. In legal terminology, these acts are referred to as crimes *mala prohibita*—crimes wrong by definition. In the conflict crime category, we find such offences as euthanasia, gambling, prostitution, some drug use, and public drunkenness—all examples of what are sometimes referred to as *morality offences*.

The important point about conflict crime is that its presence in the Criminal Code is loaded with controversy. Two decades ago, much public debate surrounded the appropriateness of a lengthy prison term for Saskatchewan farmer Robert Latimer, who killed his severely disabled daughter in what he regarded as an act of mercy. Some people regularly call for the decriminalization of assisted suicide or even of prostitution, much to the horror of other people. The public is divided about how wrong, harmful, and deserving of strict punishment these offences are.

Not all norm-violating behaviour is illegal. While we may condemn the person who refuses to come to the assistance of somebody involved in a road accident, there is no law requiring that person to be a Good Samaritan (Siegel and McCormick, 2006: 6–7). Nor is it illegal to have a mental illness, be gay, be obese, be addicted to drugs, or attempt suicide. Nonetheless, people who have a mental illness, are gay or lesbian, are obese, or are alcohol- or drug-dependent are still subject to varying degrees of **social stigma**; they may be condemned, ostracized, and medicalized because of a marker that sets them off from others (Conrad and Schneider, 1992; Goffman, 1963). Research indicates that finding a job, somewhere to live, a circle of friends, or a marital partner is significantly more difficult for a person who is recognized as a "former mental patient" than it is for others (Link, 1982). The experience of "former mental patients" in this regard is not much different from that of ex-convicts. Hagan categorizes stigmatized, but legal, acts as "social deviations."

On occasion, victims of stigma fight back. Longstanding equal rights campaigns by gays and lesbians and, increasingly, transgendered people, are one example; what have become known as "slut walks" are another recent one—collective action against victim-blaming in support of survivors of sexual violence. Young women who fail to conform to dominant normative expectations about their sexual behaviour—who engage in casual sexual relationships, for example—risk condemnation and stigmatization as "sluts." For the most part, avoiding the slut identity requires individual commitment to a stable relationship leading to marriage and children (Dunn, 2008). Slut walks represent a collective form of resistance.

In January 2011, a police officer speaking in a university classroom in Toronto proposed that "women should avoid dressing like sluts in order not to be victimized." In response to this statement, a public slut walk was organized, with participants invited to dress in deliberately provocative clothing. After the Toronto event, slut walking went global, with other large cities around the world hosting similar protests.

What is it that slut walks do? First, by mocking the disreputable and demeaning label, they are draining it of its spoiling and hurtful effects. Second, they are a collective rejection of the inference that women invite their own sexual victimization.

Hagan reserves the term *social diversion* for minority heterosexual and same-sex activities—phone sex is a contemporary example—as well as forms of symbolic or expressive deviance involving adolescents.

About the latter, the important point to remember is that young people often find themselves condemned as antisocial, threatening, or dangerous not because of what they do or don't do, but because of how they appear to others by virtue of the clothes they wear, the music that they listen to, and their hairstyles. It is not illegal to shave your head, colour your hair purple, cover your body in tattoos, have a stud in your nose, wear saggy pants, or listen to gangsta rap, but doing so often invites a censorious response from adults. Billie Joe Armstrong of the rock group Green Day, for instance, was thrown off his scheduled airline flight in August 2011 because he chose to wear saggy pants.

Particular clothing or hairstyles or musical choices are interpreted as signs of putative deviant or criminal behaviour. Before the rampage shooting at Columbine high school in April 1999, few people noted, or cared, that some adolescents wore long trench coats to school. After Columbine, trench coats were immediately banned from high schools across North America; students who wore them faced suspension (Tanner, 2015).

Generally speaking, the more serious the form of deviance, the less likely it is to occur. The most serious criminal acts—homicide and other violent interpersonal assaults—do not happen often. In 2017, homicide accounted for less than 0.2 percent of all violent crime in Canada (Allen, 2018). Conversely, other deviant acts occur routinely—so much so, in fact, that some commentators consider whether the behaviours in question (speeding on the highway, for instance) actually warrant characterization as deviant.

I must make one more point about Hagan's typology: It is subject to change. The acts, behaviours, and conditions that constitute his various categories vary over time. For instance, there was a time when drunk driving was not regarded as a serious offence, when it was inconsistently enforced and rarely punished with a prison sentence. Nowadays, we regard it as a more serious offence—indeed, it has become a consensus crime. In March 2016, Marco Musso was sentenced to 10 years in prison for a drunk driving incident in Toronto that killed two young children and their grandfather. It is doubtful that he would have received a prison sentence of that length 30 years ago. Violence against women is also treated more seriously than it was in the past.

Change can also work in the opposite direction. For example, abortion is no longer illegal in Canada. The law prohibiting abortion was repealed in 1988. In July 2008, the decision was made to award the Order of Canada to Dr. Henry Morgentaler, who started performing abortions in Canada in 1969, before it was legal. Likewise, mental illness has become a medical problem rather than a criminal problem, with those affected by it treated, not punished.

However, it is in the realm of substance use that shifting moral viewpoints and definitions of acceptable behaviour are most evident. On October 17, 2018, Canada became one of the first countries in the world to legalize the recreational use of marijuana (Portugal was the first, decriminalizing all drug use in 2001). What the long-term effects of this legislative change might be are unknown, and subject to much conjecture. Ironically, one immediate effect of legalization is that more attention has been paid to the possible harmful effects of marijuana, and the need to regulate and control its usage, than at any time during its long tenure as an illicit substance.

As an illegal drug, the rate of marijuana use by young Canadians was among the highest in the world. Not that prevalence rates were universally high for all Canadian youth. Research that I, and others, have conducted found that in contrast to white youth, large numbers of young Asians display little interest in marijuana as a recreational drug. It is exceedingly unlikely that easier access to marijuana afforded by legislation will encourage its adoption among racial and ethnic groups that, for strongly held cultural and religious reasons, oppose its use. On the other hand, the legalization of marijuana will mean that fewer black youth will be prosecuted for using it. While black youth are no more likely than white youth to be marijuana users, they have historically been more likely to be arrested and charged and convicted for doing so (Owusu-Bempah, 2018).

While marijuana has been legalized and perhaps normalized, tobacco use is becoming increasingly stigmatized and de-normalized. Although it has long been known that cigarette smoking is addictive and dangerous to health, it is only relatively recently that legal restrictions have been placed on the practice. In the recent past, smoking was normative—socially acceptable behaviour—and in some quarters seen as a sign of adult sophistication and maturity.

CRIME AND DEVIANCE AS LABELS AND SOCIAL CONSTRUCTS

Labelling Theory

Treating crime as norm-violating behaviour is a characteristic of "objectivist" (or "positivist") approaches to the subject matter. Such approaches assume that crime

and deviance are easily identified categories of behaviour, the explanations for which are found in biological traits, psychological conditions, and social forces.

However, because some acts that were once illegal are now legal, and vice versa, you should understand that while the study of crime and deviance is about rule-breaking behaviour, it is *not just* about rule-breaking behaviour. It is also about how members of society react to some behaviours. This understanding is the starting point for an approach to the study of deviance and crime that sees deviance and crime as a matter of definitions or labels that have been applied to some behaviours but not others. **Labelling theorists** believe that publicly recognizing somebody as criminal or deviant is an important cause in itself of criminal or deviant behaviour.

From a definitional perspective, crime and deviance are not distinctive types of human behaviour. We cannot divide human activity into its criminal and noncriminal variants based on behaviour alone (Becker, 1963). Few if any acts are viewed as wrong under all circumstances. On the one hand, all known human societies identify some activities as morally reprehensible and worthy of condemnation and punishment. In this sense, crime and deviance are universal. On the other hand, different human societies pronounce different acts and behaviours criminal or deviant. In other words, crime and deviance may be universal, but there are no universal forms of crime and deviance (Conrad and Schneider, 1992: 5–6).

That what counts as deviant or criminal behaviour varies by time and place is well illustrated by cases in which the argument about the universality of crime and deviance appears strongest. Take, for instance, the intentional killing of one person by another. You might think that murder would be universally acknowledged as a serious offence. However, intentional killing is not defined as murder in the context of war, when those doing the killing are our own soldiers, acting in the line of duty. Similarly, the fatal shooting of suspects by police officers rarely results in criminal charges.

Which makes the conviction of attempted murder by a Toronto police officer in 2016 an unusual case. Three years earlier, 18-year-old Sammy Yatim, wielding a knife on a Toronto streetcar, was shot and killed by a police officer. The confrontation between Yatim and the police officer was recorded and widely viewed on YouTube. But for the most part, when the state (or government) kills on our behalf (in those nations that still have the death penalty, for instance), those doing the killing are not called murderers; they are public executioners.

Incest is another interesting example. While most societies have legal prohibitions against incest, significant variation exists regarding what counts as incest. Some jurisdictions forbid sexual relationships only between brothers and sisters, while others extend the ban to include third cousins (Conrad and Schneider, 1992: 5–6). Note too that while prostitution is legal in the state of Nevada in the United States and Amsterdam, Holland, it is illegal in Canada. Similarly, while adult alcohol use is a legal and normal feature of Canadian lifestyles, in parts of the Middle East it is treated as a serious offence requiring a severe penalty—in some cases, corporal punishment.

Turning to drug use, we find that opiates have been illegal in Canada only since 1908. Before then, no legal prohibitions on their use existed. Opiate-based cough syrups and tonics were routinely prescribed by doctors and sold in pharmacies in a variety of forms. People who were dependent on opiate-based drugs were not stigmatized as criminal or deviant, nor was opiate dependency seen as a sign of mental illness.

Opiate drugs were also used for recreational purposes in smoking dens on Canada's West Coast. Their main users were Chinese immigrants who were brought to Canada to build the transcontinental railroad and received much lower wages than their European counterparts did. Public concern about the morality of recreational drug use served as a conduit for anti-Asian sentiment rooted in stiff competition for jobs after the Canadian Pacific Railroad was completed. The first Canadian anti-narcotics legislation introduced in 1908 targeted the opium dens, making the recreational usage of opiates a criminal offence for which there were heavy penalties. No such penalties accompanied the medicinal use of opiates (Cook, 1969).

Sociologists who study the social reaction to drug use conclude that the legality of a drug is determined as much by the status of its users as by the amount of harm done by the drug. The lower the status of the user, the more likely the drug will be criminalized (Becker, 1963). Consider that cocaine in its powdered form has been a drug of choice of sports stars and entertainment celebrities since the early 1970s. However, it became a significant social problem only when it became associated with poor, unemployed racial minorities in U.S. inner cities, who ingested it in small, precooked units as crack cocaine. Once

cocaine travelled down from the Hollywood Hills to the inner city, it became a major crime problem, one measure of which is that penalties for crack cocaine convictions have been more severe in the United States than for other forms of cocaine use (Reinarman and Levine, 1989).

Social Constructionism

Social constructionism shares with labelling theory an emphasis on the *subjective* qualities of crime and deviance. It proposes that particular conditions are viewed as problematic because some people—usually powerful ones—define them as such. Accordingly, social constructionists focus on the claims-making activities of interest groups, politicians, and investigative journalists, who draw our attention to conditions such as child abuse, prostitution, the disappearance and murder of Indigenous women, and cyberbullying. Social constructionists focus more on what various claims makers say about these conditions than the conditions themselves.

They are also interested in how such conditions are described. Take the situation of many young people living on the streets of Canada's major cities. Is this a problem requiring the intervention of social welfare agencies or a law and order problem demanding a response from the criminal justice system? As this example illustrates, a condition can be represented in different ways by different claims makers.

Social constructionists assert that so-called objective facts are not always responsible for the criminal or deviant status of a particular condition. They like to remind us that alcohol—a legal drug—is more damaging and harmful to individuals and society than some illegal drugs are. They point out that the number of deaths associated with tobacco and alcohol is much larger than the number stemming from the use of illegal drugs. They sometimes use such evidence to support the decriminalization of illegal drugs.

In some extreme cases, people have defined and reacted to social problems without showing that they exist. In the United States, satanic crime has received considerable media attention, even though not a shred of evidence supports repeated claims that it is a serious problem. Special crime units were set up to tackle the problem, and parental advisory groups formed to prevent the spread of satanic imagery and, presumably, satanic values and lifestyles in popular music (Sacco, 2005). In cases such as this, constructionists argue that while objective conditions and agreed-on facts play a role in the designation of deviance, they are rarely the decisive determinants of whether a particular behaviour is defined as such.

Although not all social constructionists agree about the compatibility of objectivist and constructionist perspectives (Best, 1989), I believe it possible to study the same phenomenon or condition and ask different but complementary questions about them. We could ask how and why hate crime has become a new crime problem (a constructionist question) and, at the same time, inquire about the characteristics of those who perpetrate hate crimes (an objectivist question). From an objectivist vantage point, you might ask, "Does listening to rap music cause crime and deviance?" From the constructionist perspective, the crucial question is, "Why are we so concerned about the violent content of rap music but pay so little attention to the violent content of country music?" Both are perfectly good research questions, and, in my judgment, a full understanding of crime and deviance requires both the norm-violation and labelling/constructionist approaches (Thio, 2010).

It is also often the case that objectivist and constructionist researchers study different kinds of crime and deviance. Objectivists tend to study serious, or consensual, crime—murder, sexual assault, armed robbery, and the like. Constructionists are more inclined to study noncriminal deviance—binge drinking, lap dancing, prescription drug abuse—or criminal activities, the criminal status of which is fiercely contested (prostitution, for example). They are also more interested in new or emerging forms of deviance, especially activities facilitated by the Internet and cyberspace, such as child pornography, telephone sex, and cyberbullying.

CRIME IN THE NEWS

How are crime and deviance represented in the news media and popular culture, and why does it matter? You may have heard the expression "If it bleeds, it leads." It's a good summary of the importance of crime to news organizations. The public has a big appetite for crime stories that the news media are happy to accommodate.

However, the media do not report all criminal incidents. Violent crime is reported more regularly than property or **white-collar crime** (or corporate crime), defined as financially motivated, nonviolent crime usually committed by business and government professionals. Research consistently shows that crimes of violence appear in news reports in numbers disproportionate to their incidence in official crime statistics (Greer and Reiner, 2012; Sacco, 2005).

The commonsense view about the relationship between the mass media and crime and deviance is that journalists simply record events as they happen. In this view, media accounts provide a more or less faithful reflection of objectively verifiable crime problems. However, news organizations do more than just record the facts. Whether they realize it or not, journalists shape how readers, viewers, and listeners feel and think about crime and deviance. Research on media institutions indicates that the news we consume is a result of a selection process (see Chapter 6, Communication and Mass Media). News items compete for time and space. Crime stories have an advantage in this competition because they are deemed highly newsworthy.

In his study of law and order reporting, British sociologist Steve Chibnall (1977) identified a number of informal criteria that are regularly used by journalists to select stories. Visible and spectacular incidents with political and sexual connotations rank highest. Similar rules determine how crime stories are presented—how many and which photographs will accompany a story, what headlines will be used, and so forth.

I am not suggesting that news organizations make up stories about crime or that crime problems would disappear if journalists chose to ignore them. My argument is that what we read in the newspapers and watch on TV is a result of a predictable selection process. The mass media typically exaggerate the nature and scope of crime, presenting rare cases as if they are typical or the start of a new and worrying trend.

How news organizations construct crime stories is of more than academic interest because it influences how citizens think about crime. For example, research shows that Canadians overestimate crime and **recidivism** (repeat offending) rates and underestimate the severity of criminal sanctions for crimes. Crucially, the same research also tells us that most people rely mainly on the mass media for their knowledge of crime (Roberts, 2004).

TIME FOR REVIEW

1. Are crime and deviance categories that are distinguishable by behaviour alone?
2. How does "seriousness" allow us to distinguish between different types of crime and deviance?
3. How do objectivist and social constructionist interpretations of crime and deviance differ?
4. How are crime and deviance represented in the news media and popular culture and why does it matter?

COUNTING CRIME AND DEVIANCE: NUMBERS AND MEANING

OFFICIAL STATISTICS

People naturally want to know about the amount of criminal and deviant activity in Canada, and whether it is increasing. One answer to these questions is provided by official statistics compiled by the government. Most accounts of crime and deviance are made persuasive by the use of data collected by the police, the courts, and other governmental agencies. Moreover, virtually every important theory of deviant behaviour, and especially criminal behaviour, relies on information about offences and offenders collected by or on behalf of the government. It is therefore important to know how these data are collected. For starters, note that the more serious the norm violation, the more comprehensive the data collection. So we have considerably more information about crime and delinquency, and alcohol and drug use, than we do about the expressive or symbolic deviance of adolescents (Tanner, 2015).

Since 1962, a system of uniform crime reports has provided the basic count of criminal infractions in Canada. According to an arrangement originally pioneered in the United States, police departments across the country file information on "crimes known to the police." The system is designed to produce consistent, comparable, nationwide crime statistics. For crime to become known to the police, one of two things must happen: Either members of the public experience or observe a criminal incident and pass that information on to the police, or the police themselves detect the incident.

One of the few undeniable facts about the official count of crime is that it underestimates the actual amount of crime occurring in any jurisdiction at any given time. This is not a comforting thought for people already concerned about the level of crime in society. There are well-documented reasons that citizens choose not to share their knowledge of some criminal events with the police. Sexual offences against women are notoriously underreported; lengthy and potentially humiliating court appearances are one deterrent, possible job loss another. Victims may also fear reprisals from offenders, particularly if they know them. They may feel that the incident is too trivial to bother the police. They may be too embarrassed to report the incident. They may mistakenly believe

that stolen items were lost. Some crimes are never reported to the police because the crime in question is a commercial transaction between, say, a prostitute and her client or a drug dealer and a drug buyer. In each of these cases, neither party has an interest in reporting details of the deal to the police.

The public reports most of the crime that the police know about. No more than 10 percent of crime is discovered by the police in the course of their own patrols or investigations (Sacco and Kennedy, 2011). One of the difficulties that the police face is that many crimes are committed so as to avoid detection. Most burglars, for instance, do not break into houses when they know that the police are in the area or when residents are likely to be at home.

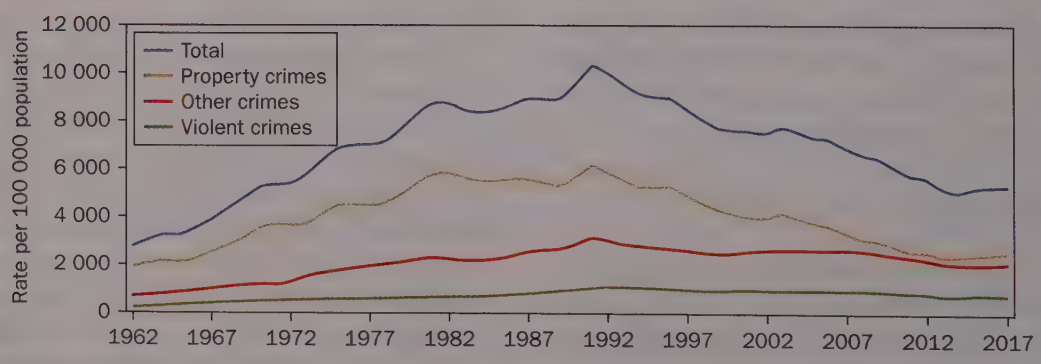
The number of criminal incidents that remain unknown to the police is often referred to as the **dark figure of crime**. It is a large figure. How large? In one of my studies, I found that just 33 percent of robberies, 23 percent of rapes, and 21 percent of assaults with a weapon were reported by young victims to the police (Tanner and Wortley, 2002). A survey of Toronto high-school students found that less than half of all self-reported deviant acts had been discovered by parents, teachers, or the police (Savoie, 2006).

What happens if members of the public become more inclined to report crime to the police—if, say, more women are prepared to report incidents of sexual victimization because of the activities of the #MeToo and Time's Up movements, or it becomes easier for people to report crime because of the widespread use of cellphones or because the organizations they work for require them to report incidents that were previously dealt with informally? What happens if police departments classify more sexual assault cases as legitimate (as opposed to unfounded) and lay more charges as a result of recent investigations by journalists into how police respond to sexual assault incidents across Canada (Doolittle 2017; Doolittle et al., 2017)? What happens if police departments are allowed to hire more police officers and acquire improved information technology? The answer, of course, is that we would start to see an increase in recorded crime, regardless of whether there had been any real change in criminal behaviour in the population. The important lesson here is that official statistics are affected by more than just the deviant motivations and behaviour of perpetrators (Liska and Messner, 1998).

In Canada in 2017, over 1.9 million crimes (excluding traffic offences) were reported to the police (Allen, 2018). A large proportion of them were classified as property crimes. A substantially smaller proportion were classified as violent crime. Note, too, that violent crime includes everything from homicide and sexual assault to pushing and shoving ("common assault").

Figure 13.2 reveals that in 2017, police-reported crime in Canada increased by 1 percent for a third consecutive year (Allen, 2018). However, sociologists of crime and deviance pay more attention to long-term trends than to short-term fluctuations. So while there was a small increase in reported crime in 2017, the crime rate that year was 23 percentage points lower than

FIGURE 13.2 Police-Reported Crimes, Canada, 1962–2017



Information presented in this chart represents data from the Uniform Crime Reporting (UCR1) Aggregate Survey, and permits historical comparisons back to 1962. New definitions of crime categories were introduced in 2009 and are available in the new format only back to 1998. As a result, numbers in this chart will not match data released in the new UCR2 format. Specifically, the definition of violent crime has been expanded. In addition, UCR1 includes some different offences in the "Other Crimes" category. Populations are based on July 1 estimates from Statistics Canada, Demography Division.

SOURCE: Statistics Canada, Canadian Centre for Justice Statistics, *Uniform Crime Reporting Survey*, 2018.

10 years previously. The recent upswing, which includes violent crimes, reflects the mass killing at the Islamic Centre in Québec City, the white van vehicular murders in Toronto, and the Danforth shootings in the same city.

REGIONAL VARIATIONS IN CRIME RATES

Official crime figures reveal intriguing regional variations. Generally speaking, provinces and cities in the western and northern parts of the country have higher crime rates than those in the east. This pattern has existed for a long time and applies to both the overall crime rate and specific types of crime.

Why is the west more crime-prone? Tim Hartnagel (2004) offers a persuasive answer. He suggests that, like its American counterpart, western Canada encourages a "frontier mentality" favouring individualism, independence, and risk-taking. On occasion, risky behaviours lead to criminal ones. The western provinces have more migrants from the rest of Canada than any other part of the country does. Migration loosens the social controls that prevent law-violating behaviour. It is easier to break rules as a stranger in town than in the community where you grew up, where everybody knows your name, and where informal social control is stronger. In addition, the populations of the western provinces are relatively young, and crime is associated with youth. Finally, Indigenous Canadians are proportionately more numerous in western Canada than in the rest of the country, and Indigenous Canadians have especially high crime rates, for reasons I will discuss later.

HOMICIDE RATES

Homicide rates are the most valid and reliable crime indicator, partly because it is hard to hide bodies. Homicide is less susceptible to the reporting and detection problems described earlier. Consensus about the gravity of the offence means that it is a crime with exceptionally high report rates. The police are also more successful at detecting homicides than most other kinds of criminal offences, although it must be said that when members of certain populations—sexual minorities, homeless people or Indigenous women—go missing, they are less likely to have the disappearance investigated as a suspected homicide. What, then, do official statistics tell us about the pattern of homicide in Canada?

In 2017, there were 660 homicides in Canada—1.80 homicides per 100 000 people (Beattie, David, and Roy, Statistics Canada, 2018). These figures represent a 7 percent increase over the previous year, and the highest rate in Canada since 2009. As has always been the case, men are more likely than women are to be both victims and perpetrators of homicide. Homicide rates are higher in the west and the north, with western Canadian cities such as Edmonton and Winnipeg having higher rates than cities in the east (Beattie, David, and Roy, 2018). And Toronto, Canada's largest city? While Toronto had a larger number of homicides (92) than any other Canadian city in 2017, its homicide rate of 1.47 per 100 000 of the population is below the Canadian average (Beattie, David, and Roy, 2018).

However, research suggests that the nature of homicide in the city is changing. Homicide victims in Toronto have become younger over time and are increasingly likely to be male and black. In addition, they are likely to be residents of particularly disadvantaged neighbourhoods (Gartner and Thompson, 2004).

Homicide in Toronto has also increasingly become a crime committed in public places, such as bars, city streets, and parks, rather than in private. For many people, the increasingly public nature of homicide is what makes it especially frightening; it suggests growing victimization of innocent bystanders in seemingly random acts of violence. Exemplifying these fears is the case of Jane Creba, a 15-year-old high-school student who was shot and killed outside Toronto's Eaton Centre on December 26, 2005. She was caught in the crossfire of a gun battle involving male youth.

The official statistics also indicate that firearm-related violent crime has increased across Canada since 2013, with sixteen of the country's largest metropolitan areas, including Toronto, reporting a spike in incidents. Nearly half of the national increase is attributable to firearm offences in Toronto and environs (Beattie, David, and Roy, 2018; Rankin, 2018).

Research, mostly American, indicates that gun murders are concentrated in the poorest parts of major cities, in areas where poverty is greatest and where jobs are in short supply. Guns are used primarily by men from low status backgrounds who are estranged from conventional society. They are used to support criminal activity (the drug trade, break and enters), as instruments of threat, intimidation, and punishment in situations of interpersonal grievances ("disrespect"), and confer a sense of symbolic masculine power. Small automatic and semiautomatic handguns are the usual weapon of choice: easy to conceal, relatively inexpensive, extremely effective.

Sociologists of homicide are interested in the relationship between murderers and their victims. The frequent crime-story image of this relationship is one of a predatory killer dispatching victims otherwise unknown to him (it usually is a "him"). Reality is different. Most victims know their killer. In Canada, this was the case in 2017 in four out of five solved homicide cases (Beattie, David, and Roy, 2018). Most stranger-homicide occurs during the course of another criminal incident—during a robbery or as the culmination of a sexual assault, for instance. People we know as family members or acquaintances are a greater threat to our safety than strangers are. Acquaintances are responsible for just under one-third of homicide victims. Family members kill a similar proportion.

A familial relationship of particular interest involves husbands and wives, and common-law spouses. Women are significantly more likely to be victims of intimate partner homicide than men are. Likewise, women are at greater risk from the violent attentions of former spouses than are men. However, the rate of spousal homicide has been decreasing over the past three decades and in recent years has remained quite stable (Boyce and Cotter, 2013).

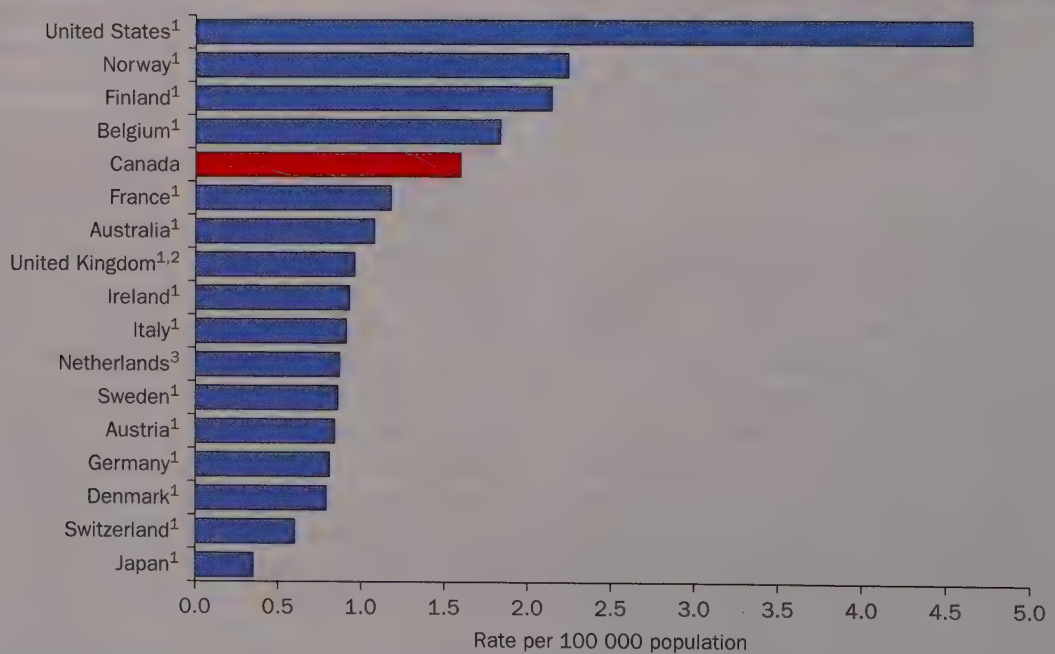
I must also note that. although constituting only 4 percent of the Canadian population, Indigenous people make up 25 percent of all homicide victims. Indigenous Canadians are also 12 times more likely than non-Indigenous Canadians to be accused of homicide (Beattie, David, and Roy, 2017).

We can also compare Canada's homicide rate with those of other rich countries. Looking at Figure 13.3, you can see that in 2012 the rate of homicide in Canada was higher than in many European nations, but considerably lower than the U.S. rate. The homicide rate on this side of the border is roughly one-third of the rate on the other side, with Chicago, of comparable size to Toronto, having a homicide rate more than five times higher than Toronto's (Boyce and Cotter, 2013).

Many people in Canada have easy access to American TV channels. Comparing Canadian and U.S. violent crime rates affords a splendid opportunity to examine one particularly popular explanation of violent crime, especially violent youth crime: that exposure to violent media contributes to real-life violence.

This is an argument with a long history. Beginning with dime store comics and continuing with movies,

FIGURE 13.3 Homicide Rate in Rich Countries, 2012



[1]2011 data.
[2]Includes England and Wales.
[3]2010 data.

SOURCE: Boyce and Cotter (2013).

TV, and popular music—first, rock 'n' roll, now rap—popular culture has often been held responsible for crimes of violence. Many things are wrong with this argument. However, the point I want to concentrate on is that people in Canada watch much the same kind of entertainment and news programming as people in the United States do, yet there are big differences in patterns of violent crime, particularly homicide. While criminologists debate the factors responsible for cross-border differences, it is unlikely that media consumption has anything to do with them.

OTHER DATA SOURCES: SELF-REPORT SURVEYS AND DIRECT OBSERVATION

Because of the shortcomings of official crime statistics, sociologists have developed additional information sources, the most important of which are self-report and observational studies. Sociologists use **self-report studies** mainly to conduct research on deviance among young people, particularly those in high school. They ask students about their deviant behaviour and, less often, their experiences of victimization. Respondents complete a questionnaire that asks them to report on their own deviant activities or experiences of victimization. Statistics Canada also conducts surveys of adult victimization periodically.

Self-report studies have their drawbacks. As with any survey on a sensitive subject, researchers must be careful to ensure that respondents give truthful answers to questions about criminal activity, drug use, and sexual assault. However, self-report studies have served sociologists well. First, they give a sense of the amount and type of crime and deviance that does not find its way into the official record. Second, their findings force us to abandon the idea that we can neatly divide the adolescent population into deviants and nondeviants—self-report studies show that many more adolescents are involved in activities that could get them into trouble with the law than are known to the police. Third, they show that young people who are charged by the police and prosecuted by the courts differ from "hidden" delinquents insofar as they are more likely to be repeat offenders and to commit serious crimes.

Researchers use **observational studies** to collect information about crime and deviance by watching it happen, either as outside observers or as participant observers. Many gang researchers have engaged in observational studies. A good example is Venkatesh's (2008) study of a Chicago street gang. While observational studies provide texture and detail to our understanding of deviance, they too have their downside. The very act of observing people can sometimes change their behaviour. Researchers studying prostitution might station themselves on a street corner to watch the action, but prostitutes, seeing the researchers, might conclude that they are police officers or investigative journalists and discontinue negotiations with potential customers (Liska and Messner, 1998: 24).

Police and court data, self-report surveys, and observational studies are different ways of collecting information about crime and deviance, but they are not necessarily alternative methods. Some investigations of crime and deviance combine different methods, gathering some information from surveys and official statistics, and additional information from observational or self-report research.

The overall profile of crime and deviance documented by the different sources is similar in many crucial respects. Students of crime and deviance are often interested in the characteristics of populations and individuals most involved with rule-breaking behaviour. Official police and court statistics and self-report studies often paint a roughly similar picture of these characteristics, as we will now see.

TIME FOR REVIEW

1. Why is the official count of crime and deviance always an underestimate?
2. How might crime rates be affected by factors other than the rule-breaking activity of criminals and deviants?
3. What are the main sources of crime data apart from official statistics?

CORRELATES OF CRIME

A correlate is a phenomenon that is associated with another phenomenon. Factors associated with criminal activity are correlates of crime. When we ask about the characteristics of people most likely to engage in crime—are they old or young, male or female, rich or poor?—we are posing questions about the correlates of crime.

Age is one important correlate of crime. Irrespective of whether crime rates are high or low in a particular time or place, people in their teens and early 20s will be disproportionately represented. Arrests typically begin in early adolescence, increase steadily throughout the teenage years, and then taper off when

individuals reach their 20s. Some criminologists have argued that the age basis of crime is universal and the single most important fact about crime requiring explanation (Gottfredson and Hirschi, 1990).

Crime also correlates with gender. Crime is not simply a young person's game; it is largely a young man's game. Again, this is a universal and enduring characteristic of all modern societies, and it is especially evident with respect to violent crime. Debate exists, however, over the degree to which the gender gap in criminality may be narrowing.

Two other correlates of crime are mired in controversy. Official police, court, and prison data often indicate an inverse relationship between social class and criminality—that is, the lower people's social and economic standing, the more likely they are to be involved in crime. However, this relationship is considerably less likely to manifest itself in self-report studies, leading some experts to conclude that the relationship between class and crime is a myth and to recommend that class not be considered an explanation of crime.

This argument does not persuade everybody in the criminology community. Detractors suggest that self-report studies fail to find a connection between class and crime because they neglect to ask questions about serious crime—murder, armed robbery, and rape, for example. Instead, they pose questions about relatively minor offences. Moreover, self-report studies often focus on students, but the most disadvantaged and marginal people are the least likely to attend school. Crucially, they are also the people most likely to be involved in criminal behaviour. When surveys include both school and street populations, and contain measures of serious crime, class reemerges as a significant correlate of crime.

Importantly, which class is most involved with crime depends on what type of crime we are talking about. **Street crime**—robbery, burglary, and the like—involves mainly people from low-status backgrounds. White-collar or business crime is more likely to involve people from more privileged backgrounds. This observation stands as a corrective to the suggestion that only the poor and disadvantaged are criminals.

The second controversial correlate of crime is race. Unlike the United States, Canada does not officially record details about the racial characteristics of offenders or their victims. People who oppose the collection of race-related crime statistics argue that any evidence showing the overrepresentation of particular racial or ethnic groups in crime might result in increased public hostility toward those groups. People who support collecting race-based crime statistics argue that if racial and ethnic minorities are treated differently by the criminal justice system—if they are more likely to be stopped, searched, arrested, and charged by the police, and more harshly punished by the courts—then the only way such bias can be exposed and changed is by gathering racial data.

Indigenous people and blacks are overrepresented in Canada's prison population: Indigenous Canadians compose nearly a quarter of the federal inmate population but just 4 percent of the Canadian population. The rate of incarceration among Indigenous adults is about 10 times higher than for non-Indigenous adults. Blacks make up about 2.5 percent of Canada's population but nearly 10 percent of the federal inmate population. Between 2005 and 2013, the federal inmate population grew by 17.5 percent. Over the same period, the proportion of Indigenous people in federal prisons grew by more than 47 percent and the proportion of blacks grew by more than 75 percent (Office of the Correctional Investigator, 2013, 2014).

Do these facts mean that Indigenous and black Canadians are committing more crime than other Canadians or that they are more likely to come to the attention of the police and the courts? Research on Indigenous peoples in western Canada suggests both racial bias in the treatment of Indigenous offenders and greater criminal activity by Indigenous peoples. Sociologists typically explain high crime rates among Indigenous Canadians by the fact that Indigenous peoples were a subjugated, colonized people who suffered enforced cultural assimilation and abuse in residential schools. As a result, they now tend to experience relatively low levels of educational achievement, dysfunctional families, high rates of substance abuse, severe estrangement from Canadian society—and high crime rates (Grekul and LaBoucane-Benson, 2008).

Indigenous populations also suffer from disproportionately high rates of victimization, a condition largely unrecognized until the disappearance and subsequent murder of a young Indigenous woman, Tina Fontaine, in 2014 attracted national and international attention. According to the RCMP, 1122 Indigenous women were murdered or were missing under suspicious circumstances between 1980 and 2012 (Amnesty International, 2014).

Criminal justice critics argue that colonialist institutions such as the reservation system and residential

schools that created conditions inviting criminal and deviant behaviour also made Indigenous populations, women in particular, vulnerable to violent victimization. They also suggest that when young Indigenous women like Tina Fontaine go missing, criminal justice personnel act with less urgency than they do with other missing persons cases (Carlson, 2014a). The police services in Thunder Bay have more recently been similarly castigated for their failure to thoroughly investigate suspicious deaths of Indigenous people. Even worse was the practice, informally described as "starlight tours," in which some police offices in Saskatchewan in the early 2000s arrested Indigenous males for drunk and disorderly behaviour, driving them out of the city, and leaving them abandoned in the freezing cold.

Research thus indicates that, at least in some contexts, race is a correlate of crime because of the activities of police officers. One study found that young black males in Toronto reporting little or no deviant activity are more likely to be arrested by police officers than are their white counterparts (Wortley and Tanner, 2005). A more recent national study found a similar pattern when comparing the experiences of visible minority youth and white youth (Fitzgerald and Carrington, 2011). Such patterns are consistent with **racial profiling**, the selective enforcement of the law based on the racial or ethnic characteristics of those apprehended by police officers.

What has become known as carding is a form of racial profiling. It involves police officers randomly (that is, without reasonable or specific concerns about suspicious behaviour), stopping individuals, often young people, and requesting information from them regarding their names, addresses, activities, friends, and associates. Without much supportive evidence, the police believe that information thus gleaned might prove useful when investigating crimes in the future—crimes not yet committed.

Failure to comply with police requests for this sort of information has had disastrous consequences for those who, within their rights, have chosen not to do so. In one case in Toronto, four black teenagers who were stopped by police on their way to evening activities at a local community centre and who denied requests for information were punched and arrested, an incident that was captured on surveillance cameras. Carding has become a highly contentious human rights issue precisely because it is a practice that disproportionately targets young visible minority males, especially blacks.

TIME FOR REVIEW

1. How are age, gender, class, and race correlated with crime?
2. Why is a correlate of crime not necessarily a cause of crime?

THEORIES OF CRIME AND DEVIANCE

When we hear about a criminal incident, especially a violent, dramatic one (a school rampage, for instance) the first question we usually ask is, Why did he do it? Sociological theories of crime and deviance drawn from the objectivist (norm violation) tradition are designed to answer these kinds of causal questions.

Sociologists are not alone in asking causal questions. Nor are they alone in answering them. Sociological explanations of crime compete with media accounts and biological and psychological explanations. A major difference between biological and psychological explanations of crime and deviance, on the one hand, and sociological explanations, on the other, is that sociologists are more interested in group-based variations in deviant and criminal activity. The psychologist will try to explain why particular individuals decided to end their lives, but sociologists, beginning with Émile Durkheim, will want to know why, for instance, Protestants are more inclined to commit suicide than Roman Catholics are, or why men are more likely to commit suicide than women are.

Different theories may explain the same deviant act. Do people steal because they have few other legitimate means of acquiring possessions or money? Because they have failed to develop strong social bonds to society? Because they pursue everyday routines that provide them with plentiful opportunities to steal with impunity? One of the tasks of sociological research is to determine which theory best explains the agreed-on facts.

Many theories of crime and deviance exist, and I will now introduce you to the most important ones.

STRAIN THEORY

Strain theory holds that crime and deviance are the result of societal pressures to break rules. We may trace the theory back to Durkheim's concept of anomie. (Recall from Chapter 1, Introducing Sociology, that, according to Durkheim, anomie exists when norms governing behaviour are vaguely defined.)

Robert Merton (1938) modified the concept to explain patterns of crime and deviance in the twentieth-century United States.

All societies, wrote Merton, establish culturally approved goals for their members and socially approved means of achieving those goals. However, some societies, such as the United States, pay more attention to goals of wealth, power, and prestige than to appropriate ways of achieving them. The imbalance between goals and means creates stress for lower-class people. They want what all Americans want—a nice house, a big car, a steady job—but lack legitimate means of achieving them, notably school and work opportunities. Rebuffed, they respond in a variety of deviant ways to the resulting stress. One mode of adaptation (Merton called it "innovation") involves using criminal means to achieve economic success.

People involved in money-making criminal enterprises exemplify Merton's innovators. Gangsters like the fictional Tony Soprano or the real life Al Capone subscribed to the American dream. They believed in, and aspired to, power, wealth, and status. Where they differed from noncriminals is in their chosen means of achieving those goals. Instead of pursuing educational qualifications and legitimate careers, they opted for illegal strategies.

Merton's innovators have also made their appearance in the world of professional sports. International cycling has been rife with deviant behaviour—cheating—for years (Walsh, 2013). Its chief instigator has been Lance Armstrong. Armstrong learned early in his cycling career that the use of performance-enhancing drugs was the only way that he would achieve any success in his chosen occupation. He adopted a win-at-all-costs mentality.

Some analysts argue that sports had been primed for this kind of deviance because of its importance for large numbers of people because of the large amounts of sponsorship money poured into it and because it is difficult for sports administrators to monitor practices surrounding performance-enhancing drugs. Research confirms that the huge rewards associated with professional sports motivate the use of performance-enhancing drugs and cheating more generally (Stewart and Smith, 2008). While most athletes condemn the use of such drugs, many are nonetheless prepared to use them because of the importance of winning. Athletes also know that their careers are short—thereby providing more incentive to cheat. Finally, drug cheating is often rationalized or neutralized by offenders on the grounds that "Everybody does it."

Several studies add weight to strain theory by examining the relationship between income inequality and rates of homicide. They find that people in the lowest income group are most inclined to homicidal activity. This finding is consistent with the view that pressure to deviate is strongest among people with the fewest conventional opportunities. Moreover, the relationship is strongest in societies that most strongly emphasize success goals and where material inequalities are greatest (Krahn, Hartnagel, and Gartrell, 1986).

Other strain theories of crime and deviance focus on thwarted ambition and its criminal consequences among lower-class male youth. Albert Cohen (1955) saw delinquency among working-class boys as resulting from school experiences. Encouraged to strive for success, they find their ambitions blocked because the sort of socialization they have received at home prepares them poorly for success in school. Frustrated because of their inability to measure up to what Cohen calls the school's "middle-class measuring rod," they react against the school system by engaging in activities that directly counter those valued and sponsored by the school. Hence, they commit delinquent behaviour that appears to be without purpose, such as vandalism. According to Cohen, destructive behaviour is its own reward, a way of subverting the middle-class measuring rod.

A third variant of strain theory combines elements from both Merton and Cohen. According to Cloward and Ohlin (1960), deviant motivation, in the form of limited opportunity, is not enough to explain criminal behaviour. Frustrated adolescents also need access to deviant opportunities to become delinquent. Not all would-be delinquents have the opportunity to become criminal innovators, as Merton supposes. Low-status people become involved in different types of deviant subculture depending on the opportunities available to them. Those who have the opportunity to learn from adult thieves gravitate to criminal gangs. Those without those networks but in possession of the necessary physical attributes and combat skills may join fighting gangs. Those without conventional or criminal opportunities may end up in drug-based subcultures.

Some contemporary applications of strain theory document the social pressures that result in higher rates of deviance among socially disadvantaged groups. Other extensions of classic strain theory seek

to explain the frustrations that drive some individuals to crime and deviance. An important and influential example of the latter is Robert Agnew's (1992) general strain theory, which focuses on the stresses that ensue from different social relationships, not just those that result from chasing inaccessible success goals. Agnew argues that negative relationships generate negative emotions, such as anxiety, fear, and anger that, in turn, generate deviant responses.

First, relationships with others may hinder the achievement of a valued goal. Adolescents might see parents or teachers as barriers to desired outcomes, such as spending leisure time with friends. Second, adolescents may lose or be threatened with losing something or someone of value to them—a job, say, or a parent through divorce. The third type of toxic relationship involves situations from which adolescents find it difficult or impossible to extricate themselves, such as the clutches of bullies at school or an abusive father at home.

Agnew suggests that these myriad strains sour relationships with others and can lead to deviant and disreputable behaviour of various kinds. Much research supports Agnew's claims. Among young people who are experiencing the sorts of strains listed above, delinquency provides more relief than do nondeviant solutions (Vold, Bernard, and Snipes, 2002).

SOCIAL LEARNING THEORIES: EDWIN SUTHERLAND AND DIFFERENTIAL ASSOCIATION

The basic proposition of learning theories is that willingness to break rules is a consequence of the socialization experience to which individuals have been exposed. Some people are motivated to engage in crime because they have acquired favourable opinions about what others regard as deviant behaviour. The learning of antisocial conduct and practices takes place in a variety of settings, beginning with the family and continuing with the peer group and the neighbourhood. Within each of these contexts, people may see as normal what others regard as wrong, dangerous, harmful, and shameful.

The best-known proponent of the learning perspective is Edwin Sutherland (1947), who insisted that a process of **differential association** is primarily responsible for deviant or nondeviant behaviour. Specifically, if people experience more nondeviant than deviant associations as they grow up, they are likely to follow the straight and narrow. Otherwise, they are likely to become deviants. According to Sutherland, criminals need to learn the tricks of the trade—how to steal a car or rob a bank, for instance. No less importantly, they must also learn rationalizations that tell them that stealing other people's money or property is justifiable. More association with deviant than nondeviant lifestyles teaches people these two important sets of lessons. Moreover, learning continues later in life. For example, research that I conducted with Scot Wortley showed that ex-inmates often believe that their time in prison has been a learning experience. The ex-inmates we interviewed described how prison enabled them to become more immersed in gang culture, learn new skills, and develop additional reasons for hating the police (Wortley and Tanner, 2005).

CONTROL THEORY

Travis Hirschi (1969) pioneered **control theory**. Its basic argument is that a set of ties bind young people to the conventional world, and when those ties are weak, deviance and crime occur. No special motivation is required. According to Hirschi, we all have within us a natural inclination for rule-breaking that is kept in check only because we have developed *attachments* to family and friends, *commitments* to conventional ambitions and activities in school and at work, prosocial *values and beliefs* that we share with people who are important to us, and conventional *activities* at school and at work. Individuals less constrained by such ties are more likely to become involved in crime and deviance.

Control theory has a solid reputation as a predictor of relatively minor and occasional deviance involving adolescents. However, when more serious crime and delinquency are involved, and when the deviant behaviour in question appears more motivated or has a political underpinning, it is less plausible. In the summer of 2014, rioting in Ferguson, Missouri, broke out when a white police officer shot and killed an unarmed black youth. Explaining the riot and the rioters (like the victim, mainly black youth) by reference to weak ties alone obscures the racial politics involved–young black people taking to the streets to protest racial injustice (see Critical Sociology: The Politics of Criminal Justice). Likewise, control theory fails to explain why members of disadvantaged groups fail to develop conventional attachments to society in the first place.

A more recent variant of control theory is the so-called general theory of crime, which argues that all deviance has a common cause in low self-control.

Critical Sociology THE POLITICS OF CRIMINAL JUSTICE

In response to several government commissions and inquiries, Indigenous principles and practices have begun to be adopted in the administration of Canadian justice. Healing circles and restorative justice programs allow perpetrators to better understand the harm they have done, express their remorse to victims, and compensate them for their wrongdoing. In addition, police departments have created special hate crime units to counter high levels of Indigenous victimization. They have also mandated sensitivity training for police officers dealing with Indigenous communities and sought to recruit more Indigenous police officers so that police departments can better reflect the racial and ethnic composition of the communities they police (Carlson, 2014b; Minaker and Hogeveen, 2009:169–70; Stenning, 2003).

South of the border, the black/white divide has generated many of the concerns with criminal justice that Indigenous people have in Canada. Ferguson, a primarily black suburb of St. Louis, Missouri, exemplifies the volatile character of the American criminal justice system, the lightning rod for which is black people's encounters with a police department that is overwhelmingly white and, like other American police forces, equipped with army surplus heavy weaponry, and is highly militarized in its tactics.

The situation in Ferguson popularized a relatively inexpensive and easy measure for reducing the incidence of misused lethal force: mandatory body cameras. Like other people, if police officers know that their behaviours are being observed, they tend to behave differently. The only problem with this technological fix is that body cameras can be easily be turned off or broken, unintentionally or otherwise.

Also in the American South, riots broke out in Charlottesville, Virginia, in August 2017, when right-wing protesters opposed the removal of the statue of Confederate General Robert E. Lee, who fought on the losing side in the American Civil War (1861–65), and clashed with left-wing supporters of the removal. One person was killed by a white supremacist and many people were injured.

In late 2018, rising fuel taxes and the high cost of living in France resulted in violent and destructive protests, with people hurt and important symbols of the French Republic badly damaged. Many of the largely blue-collar protesters wore yellow vests of the sort commonly and conventionally used by motorists requiring highway assistance. The symbolic messaging of the protesters was that they, too, were persons in distress.

The Yellow Vests movement originated in France in November 2018, bringing together protesters against the high cost of living and high taxes.

SOURCE: © Guillaume Louyot Onickz Artworks/Shutterstock.

Incidents of this sort illustrate that it is not always easy to distinguish between criminal and political responses to systemic inequality and discrimination. The Idle No More movement has been led for the most part by a university-educated generation of young Indigenous people, mostly women, who are no longer prepared to put up with age-old inequities. The movement is the product of their rising expectations and frustrations with the slow pace of reform (Friesen, 2013). The same holds true for Ferguson, where events kindled a debate about the causes and consequences of racial inequality in the United States and the policies that could help deal with the problem. Surely, not all crime is tinged with political implications, but just as surely, some of it is.

Critical Thinking Question

How can you distinguish crime generated by systemic inequality and discrimination from crime generated by other circumstances?

Gottfredson and Hirschi (1990) proposed that rule-breaking of all sorts shares common features. It is easy to execute, immediately satisfying, risky, exciting, produces few long-lasting rewards, and is harmful to others. The personality characteristics of individuals with low self-control include impulsivity, a taste for risk, an action orientation, and short-term thinking.

Low self-control presumably originates in early socialization when parents are too busy or unconcerned to police their children's behaviour and unable or unwilling to teach them the difference between

right and wrong. Canadian research finds that low self-control predicts driving under the influence of alcohol and school-related behavioural problems among high-school students (Keane, Maxim, and Teevan, 1993; Nakhaie, Silverman, and Lagrange, 2000).

ROUTINE ACTIVITIES THEORY

By locating the source of crime in the structuring of everyday life, **routine activities theory** also downplays the significance of criminal motivation. It argues that much criminal behaviour is not dependent on complex causation. The presence of a suitable target and the absence of capable guardians suffice. Bring these conditions together with motivated offenders, and deviance and crime are likely to result.

Cohen and Felson (1979; Felson and Eckert, 2019) suggest that the development of expensive and highly valued consumer goods has encouraged property crime because items like iPods, computers, and cellphones are easy to steal and transport. They also reason that residential property is harder to protect because increased labour force participation means that fewer homeowners are around during the day to deter burglars. Also, compared with earlier eras, the amount of leisure time that teenagers have at their disposal provides them with more opportunity to engage in delinquent acts.

Routine activities theorists argue that crime rates vary not just because of the number of individuals in the population willing and prepared to commit crime, but also because of the presence or absence of capable guardians, and because of the daily routines that people follow. Research shows that some routines are more closely linked to criminal offending and criminal victimization than others are. People who spend large stretches of time away from home each day at work and out on the town in the evening and on weekends report higher levels of victimization than those who live more home-centred lives. Teenagers who spend large stretches of time in unsupervised leisure activities with other teenagers are at particular risk of criminal victimization and offending.

A useful illustration of how daily routines structure deviant behaviour is Hagan and McCarthy's (1997) study of street youth and crime in Toronto. They demonstrate that a substantial amount of criminal activity by street youth is motivated by situational exigencies. Nothing very surprising about this observation, you might say—except for the fact that most theories of crime have looked to the past to explain the criminal present. Strain and learning theories identify the roots of crime in lack of opportunity and differential association; control theories explain deviance by the failure to develop pro-social bonds early on at home or in school. Hagan and McCarthy argue that while these theories do a good job of explaining why some young people leave home and are on the street in the first place, they are less useful for explaining patterns of crime that occur afterward. Crime on the streets has more immediate causes. Street life thus becomes a relatively independent influence on such activities as theft and prostitution.

TIME FOR REVIEW

1. What are the main differences among strain, social learning, social control, and routine activities theories of crime and deviance?
2. In what ways might crime and inequality be linked?
3. Why might control theories provide a good explanation of minor adolescent deviance but not the kind of race riots that occur frequently in the United States?

TYPES OF CRIME AND DEVIANCE

So far, we have looked at conceptions of deviance and crime, ways of measuring their incidence, and prominent theories of criminal deviance. I now turn to several subfields of the sociological study of crime and deviance.

GENDER AND CRIME

Sociological studies of female crime and deviance are a recent development. In the past, sociologists ignored female wrongdoers because they thought their numbers were small or assumed that all female deviants were prostitutes. They judged male deviance a law and order problem and female deviance a sexual problem. This sexualized view of female deviance derives from the criminal records of known offenders. Historically, most girls and women were arrested and incarcerated for prostitution or because they were suspected carriers of venereal disease.

Self-report studies have done much to dispel the notion of female offenders as sexual deviants. They show that girls and women are no strangers to deviant behaviour of all types. Official and unofficial measures of crime and deviance indicate that the major

difference between males and females is largely one of volume. Males are more inclined than females to crime and deviance (especially violent crime), start their deviant activities earlier, and end them later.

Increasingly, however, some sociologists see female crime as a growing problem. Women and girls are becoming more violent, more involved in gang activity, and so on. High-profile cases, such as the murder in 1997 of 14-year-old Reena Virk in Victoria and the subsequent trials of one of the young females accused of the crime, have done much to consolidate this kind of argument.

The belief that we are witnessing shifting patterns of female crime and deviance has led to the development of theories that link these changes to the effects of changing gender roles in society. In the 1970s, sociologists proposed the "liberation hypothesis," suggesting that, as women less frequently perform traditional domestic roles as wives and mothers, and begin entering the paid labour force in larger numbers, their patterns of crime and deviance will come to resemble those of males (Adler, 1975; Simon, 1975). However, available evidence offers little support for the liberation hypothesis. Differences in male and female crime rates, particularly violent crime, are quite stable over time.

Recently, some sociologists have asserted that while young women may be less physically violent and aggressive than their male counterparts are, they are more likely to take part in psychological aggression directed against other girls, such as name calling, spreading harmful gossip, and rumour mongering. This argument, too, has been challenged by research showing that psychological aggression is not the exclusive prerogative of "mean girls," and that girls who are victims of relational aggression are targeted by boys, too (Chesney-Lind, Morash, and Irwin, 2007).

Should squeegee kids' actions be considered criminal, a nuisance, or a form of subsistence work?

SOURCE: © CP PHOTO/Phill Snel.

Currently, two schools of thought exist about how to account for similarities and differences between the deviant activities of males and females. Some analysts think that female wrongdoing can best be explained by the same concepts and theories used to explain male wrongdoing. For example, Canadian research indicates that lower levels of deviance and criminality among young females than among young males can be explained by the concepts of control and opportunity (Hagan, Gillis, and Simpson, 1987).

Conversely, sociologists influenced by feminist ideas are more likely to argue for gender-specific theories of crime and deviance. They argue that it is unreasonable to suppose that theories devised with male behaviour in mind, and tested exclusively with information supplied by males, will prove equally applicable to female deviants. The idea that we might need different theories to explain male and female deviance receives partial support from a U.S. study. Researchers found that depression was a cause of female delinquency but not male delinquency. They also reported that playing sports increases male violence but not female violence (Daigle, Cullen, and Wright, 2007; see Critical Sociology: Schools, Sexual Assault, and Sexualized Dress Codes).

YOUTH, CRIME, AND DEVIANCE

Young people are at the heart of most people's concerns about crime and deviance (Tanner, 2015; see the Critical Sociology feature, Schools, Sexual Assault, and Sexualized Dress Codes). It has been this way for a long time, with successive adult generations believing that the behaviour of young people has never been worse than it is. Media coverage encourages such views, preferring bad news stories to more uplifting ones, and focusing on high-profile and unrepresentative crimes of violence rather than more typical shoplifting incidents, for example.

Moral panics are extreme reactions to deviance and crime, and social constructionists have examined them extensively. Episodes of moral panic are characterized by the conviction that the deviance or crime in question is sufficiently dangerous that it constitutes a threat to the core values and well-being of society. Politicians, newspaper editors, and prominent people clamour for immediate action. They typically say that something has to be done right away or the situation

Critical Sociology SCHOOLS, SEXUAL ASSAULT, AND SEXUALIZED DRESS CODES

In November 2018, several students from St. Michael's College, an all-male private high school in Toronto, were expelled and subsequently charged with sexual assault (with a broom handle in one incident). The expulsions began after cellphone video of several of the incidents appeared on social media.

Many people believe that single-sex educational institutions allow boys and girls to flourish academically without the distraction of the opposite sex. However, it is also possible that such an environment facilitates the development of sexual violence of the sort on display at St. Michael's College; some observers suggest that group-based ritualized sexual violence in schools is attributable to an all-male environment that nurtures a "toxic," hyper-masculinist, "bro" culture (Williams, 2018).

Some of the traditional thinking about differences between male and female norm violation has crept into contemporary debates about dress codes in school. One Monday morning in 2018, the male principal of a Catholic high school in Ontario entered a Grade 12 classroom and instructed the girls to stand up. He then proceeded to measure the length of their skirts. The boys remained in their seats and watched. The principal was enforcing dress code policy: Skirts could be no more than 10 centimetres above the knee. Some of the girls objected to the skirt test. There was no equivalent enforcement of dress regulations for the boys. The girls felt stigmatized and believed that they were being held accountable to a standard that did not apply to the boys. The principal ended up apologizing to the girls.

What made this incident controversial was that it involved different rules for and girls and boys—a double standard—insofar as it shamed the girls, holding them responsible for drawing attention to their bodies and blaming them for any sexual victimization to which they might ultimately be subjected (Alphonso, 2018).

Critical Thinking Questions

1. Why do schools have dress code policies?
2. Can these policies have unintended consequences?

will only get worse. Some examples of moral panic in Canada have focused on raves (Hier, 2002) and so-called "squeegee kids" (Parnaby, 2003).

In Summerville, South Carolina, Grade 9 student Alec Stone was arrested in 2014 just days into the new school year after writing a Facebook update about killing his neighbour's pet dinosaur with a gun. Police searched his book bag and locker, and school officials started questioning him about the comment. Stone said it was just a joke and then became irate. He was handcuffed, taken into custody, and suspended from school. Was the reaction on the part of school authorities and the police justified or did it reflect the moral panic surrounding school shootings in the United States?

Most moral panics involve young people for two main reasons. First, many adults view them as vulnerable to corrupting influences from "satanic" adults to violent movies, video games, and rap music. Second, young people represent the future. If bad influences corrupt them now, what will become of the nation when they reach adulthood?

How can we spot moral panics? Moral panics exist when the public reaction to deviance or crime is far out of proportion to the nature and scope of the problem—when, for instance, there is little or no factual basis to claims about increased levels of drug use among young people or incidents of lethal violence in schools, or when U.S. President Donald Trump claims, as he does repeatedly, that immigration increases crime rates (it doesn't) (Ben-Yehuda, 1986; Lawrence and Mueller, 2003).

Youth Gangs

Youth gangs have emerged as a major crime problem in Canada over the past decade or so because of an apparent increase in gang activity in large cities. However, gang activity has attracted more media attention than academic research. Much of the research is several decades old and based on small samples of already-identified groups of young people in specific geographic locations—for instance, immigrant gangs in British Columbia (Gordon, 2000).

I conducted an investigation of youth gang activity in Toronto with Scot Wortley (Wortley and Tanner, 2004). We interviewed a sample of high-school students and street youth and learned that many of our respondents who reported past or present gang membership were not involved in criminal activities at all. Their gang membership had more to do with the pursuit of legitimate leisure activities than

deviant ones. Membership in organizations involved with crime and deviance, such as drug trafficking and violent conflict with other gangs, was more common among street youth than among high-school students.

We also found that poverty, race and ethnicity, family structure, and living arrangements influence gang membership. These factors reflect the patterns of inequality, disadvantage, and discrimination to which strain theorists draw our attention. Other recent Canadian research tells a similar story. For example, disadvantaged Indigenous youth in the west are recruited into gangs that provide them with status and income (largely from the drug trade, where they work as low-level dealers) otherwise denied them in cities like Winnipeg and Regina or on the reserve. The larger American research literature documents the same pattern.

Serious and repetitive gang activity can result in incarceration for gang members. Evidence suggests that the prison system also functions as a recruiting ground for gang members. On occasion, gangs formed in prison extend their activities onto the street once members are released (Grekul and LaBoucane-Benson, 2008). American research has found a similar pattern with bike gangs and white supremacist groups.

NET EFFECTS: INTERNET DEVIANCE

The rapid development of computer technology—the Internet in particular—has significantly expanded opportunities for deviant and disreputable behaviour (Thio, 2010). The deviant purposes that computers have been used for include, but are not limited to, identity theft, cyberstalking, and the sale and distribution of pornography.

Identity theft has become the fastest-growing crime of the twenty-first century. Credit card, health card, and driving licence information is stolen and used to buy goods and services. It is easy to do and difficult to detect and is much more profitable than conventional property crime.

Pornography is not, of course, an invention of the Internet. The Internet has, however, made its consumption considerably easier, making it accessible to a wide range of buyers, including adolescents. Internet porn has the advantage of being a home-based activity, allowing users to indulge in it without surreptitious visits to adult bookstores and video stores that might reveal their disreputable tastes to others. The Internet has become a principal means by which the trade in child pornography has flourished (Jenkins, 2001).

The Internet has also become a medium by which people can target their dislike of, or hatred for, other people. In September 2010, an 18-year-old male student at Rutgers University in the United States used a webcam to secretly film his roommate kissing another male. The encounter was then streamed over the Internet. The roommate, Tyler Clementi, subsequently committed suicide—as did Rehtaeh Parsons and Amanda Todd, two young Canadian women, after each had been relentlessly cyberbullied. Cyberspace has also been used to send nude photos of female Hollywood celebrities around the world.

On occasion, the Internet has been deployed not out of malice or for financial gain but for essentially political reasons. A case in point is the WikiLeaks phenomenon. Orchestrated by Internet activist Julian Assange, WikiLeaks is an organization that disseminates classified information over the Internet. It has been responsible for, among other activities, the downloading of secret military information detailing the Iraq war. While political and military leaders in Washington and London have portrayed such leaks as wildly outrageous criminal acts, Assange and his supporters prefer to see themselves as courageous defenders of freedom of information. (Crime fiction has similarly embraced the idea of the computer hacker as hero in the form of Lisbeth Sander, the heroine of *The Girl with the Dragon Tattoo* [Larsson, 2008]).

TIME FOR REVIEW

1. What are moral panics and why do they often involve young people?
2. How has the Internet allowed people to create new forms of crime and deviance and new ways of engaging in crime and deviance?

RESPONDING TO CRIME AND DEVIANCE

When sociologists study reactions to deviant behaviour, they are examining the ways in which societies try to prevent or control that behaviour.

INCARCERATION

The prison is the chief means by which we seek to control crime. Canada's first prison was Kingston Penitentiary, opened in 1835. Before then, convicted offenders received other forms of punishment,

including hanging and deportation. Canada introduced prisons to incapacitate and punish offenders and discourage them (as well as other potential offenders) from committing additional crimes. Prisons were also expected to reform offenders, encouraging them to live law-abiding lives by teaching them work skills while serving time.

For more than a hundred years, Canada's prison population has varied very little in proportionate terms, fluctuating between 80 and 118 adults per 100 000 people (Brown, 2011; Walmsley, 2013). While the staggeringly high rate of incarceration in the United States and Russia is the main story told in Figure 13.4, it is worth noting that Canada is more likely to imprison offenders than are several Western European nations.

Prisons do a poor job of rehabilitating prisoners. Many studies show that the recidivism rate among ex-prisoners is high, with a large proportion of the prison population at any one time made up of people who have been there before—sometimes several times before (Liebling and Crewe 2012).

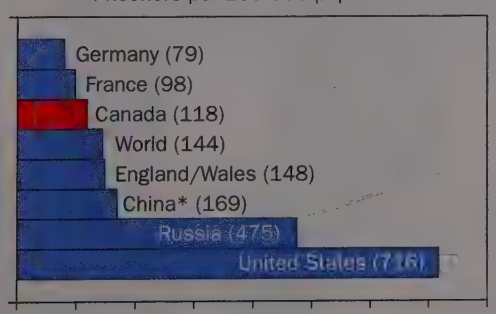
Prison inmates suffer numerous deprivations. They are denied their freedom, required to abide by other peoples' rules and schedules, not allowed to wear their own clothing, have limited contact with friends and family from the outside, and live in an overcrowded, dirty, smelly, and violent environment. The unpleasantness of prison life is not a problem for people who believe that prison's main purpose is to punish, deter, and incapacitate offenders. It is a problem for people who adhere to rehabilitative ideals.

Prisons fail to rehabilitate for three reasons. First, commitment to the rehabilitative ideal has never been strong to begin with, with few resources allocated to that goal. Second, in response to the harsh conditions that they encounter, prisoners have developed an inmate subculture with its own code of conduct that often challenges the regime imposed on them. Third, prisoners learn new criminal skills from other prisoners and learn how to justify the use of violence (Sykes, 1958). Given immersion in the prison subculture, prison time is more likely to lead to more prison time than to rehabilitation.

Prisons are the centrepiece of approaches to crime control that emphasize suppression. Calls for tougher law enforcement—more proactive policing, longer prison sentences for habitual criminals, mandatory minimum sentences for violent, gun, and gang-related crime—are all examples of suppressive strategies.

Solitary confinement has become a controversial feature of Canadian penal philosophy. It involves spending 22 hours a day, seven days a week, for up to 150 days, locked up in a space the size of a small bathroom, with the lights on all night and meals delivered through a slot in the wall. Compared to other nations, Canada might be regarded as relatively liberal with regard to its judicial policies and sentencing practices

FIGURE 13.4 Prison Population, Selected Countries, 2013



* Includes 650 000 people in "administrative detention."

Share of Prisoners per Country

Country	Percentage of World's Prisoners	Percentage of World's Prisoners/Percentage of World's Population
China*	20.8	1.1
United States	20.4	4.6
Russia	6.2	3.1
England/Wales	0.8	1.0
France	0.6	0.7
Germany	0.6	0.5
Canada	0.4	0.8
Other	50.2	0.7
Total	100.0	

SOURCE: Adapted from Roy Walmsley, *World Prison Population List*, 10th edition, 2013. At http://www.prisonstudies.org/sites/prisonstudies.org/files/resources/downloads/wppl_10.pdf (retrieved 15 December 2014).

(refer back to Figure 13.4). Still, it has been harshly criticized domestically and internationally for its illiberal use of solitary confinement.

Solitary confinement is a prison within a prison: Inmates have little contact with the other prisoners, prison staff and, of course, outside world (no visitors are permitted). While it might be thought that solitary confinement is reserved for a small minority of dangerous or violent offenders, it is not, at least in Ontario. Although the use of solitary confinement was never intended as a measure for accommodating prisoners with mental health problems, that is the purpose to which it is often put.

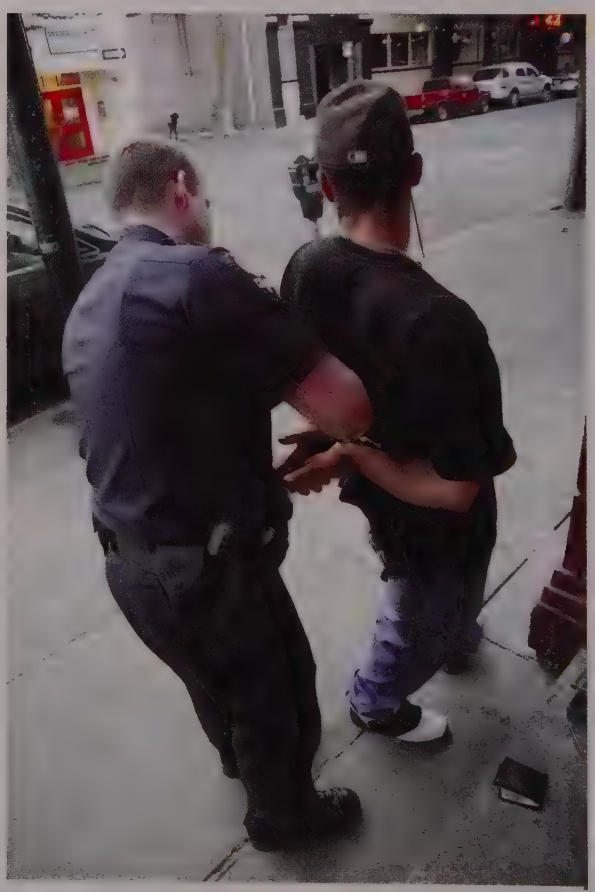
The effects of solitary confinement on the human condition are well known and predictable. It initiates, or worsens, depression, anxiety, and paranoia, and has resulted in many cases of self-harm and injury, including fourteen suicides in federal correctional institutions between 2011 and 2014. The death of 19-year-old Ashley Smith highlighted some of the catastrophic effects. In trouble with the law for largely minor offences at a young age, she spent much of her young life in and out of custodial institutions, much of the time segregated from the rest of the prison population. In October 2007, confined to the Grande Valley Institution for Women in Kitchener, she hanged herself. She was under suicide watch at the time. In December 2013, a coroner's jury determined that her suicide was in fact a homicide caused by negligent prison personnel. Among the recommendations of the coroner's jury was an indefinite ban on solitary confinement (John Howard Society of Ontario, 2017).

Deterrence theory holds that getting tough on crime will lead to its eradication or at least reduce the probability of offending. Deterrence can take one of two main forms. *General deterrence* is the process by which the punishment of some law violators discourages other potential law violators from breaking the law. *Specific deterrence* is the process by which an individual who has been caught and punished for an offence will find the experience sufficiently costly that he or she will not repeat the wrongdoing.

Deterrence, whether specific or general, has three elements. The first involves the severity of the penalty. Are offenders given jail time or just a fine? The second involves the certainty of punishment. When drivers consider the chance of getting caught speeding, they are considering the certainty of punishment. The final element is the speed of punishment. How long after law violators have been apprehended do they have to wait for punishment? Deterrence theory holds that law-violating behaviour will be low when severity, certainty, and speed of punishment are high.

Most practical applications of deterrence theory concentrate on the severity or harshness of legal sanctions. Hence, the advocacy of capital punishment, long prison terms, and boot camp. However, most research does not support the proposition that harsh punishment deters. Where it exists, the death penalty has not reduced homicide rates (Fuller and Wozniak, 2006: 266). Boot camp has been less effective than other means of dealing with young offenders (Doob and Cesaroni, 2004). Longer prison terms are no more effective in reducing recidivism than are shorter terms (Doob and Webster, 2003).

The problem with deterrence theory is its assumption that criminals are rational calculators, carefully calibrating the costs of crime against its rewards. However, most criminals have only an imprecise understanding of the punishment they



Canada has a higher incarceration rate than most Western European countries.

SOURCE: © Michael Matthews—Police Images/Alamy.

might receive for a given offence. Moreover, many violent crimes are prefigured by anger, which works against rational calculation. More evidence supports the **certainty principle**, which holds that potential offenders are more often deterred by the thought of certain but moderate punishment than by the guarantee of severe punishment for an act they believe they can get away with (Ashworth and Roberts, 2012; Von Hirsch et al., 1999).

In addition to not necessarily producing lower crime rates, get-tough policies come with a high price. Keeping people in prison costs a lot. Mandatory minimum sentences mean that there will be more people in prison. More people in prison means that more people coming out of prison and trying to find a job and accommodation will be burdened with the stigma of being an ex-convict. In the United States, the "war on drugs" has resulted in the incarceration of bit players in the drug trade: addicted users and minor suppliers. The sheer expense of locking up minor criminals means that fewer tax dollars are available for other kinds of law enforcement and anti-crime policies that focus on prevention and intervention.

INTERVENTION

Many sociologists view community intervention on behalf of young offenders as an effective strategy for reducing crime. Interventionist policies assume that we can most effectively tackle crime by weakening motivations and minimizing opportunities for law-breaking. Interventions include recreational programs for neighbourhood youth, counselling sessions, and the assignment of youth workers to neighbourhood street gangs. While programs of this sort have always commanded tremendous loyalty from their practitioners, they are expensive and have rarely been properly evaluated for their effectiveness.

PREVENTING CRIME

Too much of our thinking about crime focuses on catching and controlling offenders. Public policy debates about crime rarely discuss nonlegal solutions. Yet given what we know about the risk factors associated with serious and repetitive criminality among youth, one may reasonably suggest that expanded daycare, for example, might be a less costly and more effective investment of taxpayers' dollars than imprisonment is.

Evidence that some criminal justice policies do not work, or do not work as well as we would like them to, does not mean that they are going to be abandoned. Criminal justice policies are driven mainly by political ideology, not criminological research. This is particularly true for juvenile justice policy.

Much if not most of the controversy surrounding criminal justice policy in Canada centres on young people. Over the past century, young people in trouble with the law have fallen under the provisions of the Juvenile Delinquents Act of 1908, the Young Offenders Act of 1984, and the Youth Criminal Justice Act of 2003.

The Juvenile Delinquents Act was replaced by the Young Offenders Act in large measure because critics felt that it was failing to deter or prevent rising rates of juvenile crime. The Young Offenders Act was replaced by the Youth Criminal Justice Act for much the same reason. The current Youth Criminal Justice Act emphasizes getting tough on serious repeat young offenders while adopting less punitive strategies for the far more numerous minor offenders, including warnings and community-based diversionary programs.

BIG BROTHER IS WATCHING YOU: SURVEILLANCE IN EVERYDAY LIFE

Prisons and incarceration are not the only means by which authorities seek to constrain the behaviour of citizens. Nor are lawbreakers their only concern. Today, public and private institutions increasingly seek to monitor and control the behaviour of ordinary law-abiding citizens as well as recognized deviants (Staples, 2008).

Consider the following facts: Convicted offenders under house arrest are required to wear electronic bracelets, tracking their movements. Some job seekers are required to comply with obligatory drug tests as a condition of employment. Store owners use video cameras to observe customers and employees. Companies routinely trace the online purchasing habits of Internet users. These examples illustrate eroding differences between the criminal justice system's way of doing things and the ordinary, everyday culture of surveillance. Their common goal is to regulate everyday behaviour and establish conformity.

Everyday surveillance is distinguished from more formal kinds of social control, first, by its scope. The closed circuit television (CCTV)

camera scans everybody—not just the suspicious-looking shoppers in high-end stores and not just the teenagers lurking in the parking lot. Second, our behaviour is controlled less by the threat of punishment than by the certain knowledge that we are being watched. Third, surveillance is everywhere. Whereas, historically, criminals were confined to prisons, and those with mental illnesses to asylums, ordinary citizens are regulated, and encouraged to self-regulate, by the omnipresence of the all-seeing CCTV camera, the threat of random drug tests, and compulsory ID tags.

The perception of high crime rates and the resultant fear has persuaded many people that crime is a problem that the state and its criminal justice apparatus cannot do much about. Specifically, many people believe crime cannot be easily contained and controlled by rehabilitative policies. In their place, new forms of social control have emerged, particularly among those who can afford elaborate private security arrangements—gated communities patrolled by private security guards, extensive home security systems, and the like (Garland, 2001).

Much of the expansion and growing intrusiveness of surveillance is also a response to international terrorism—Al-Qaeda after 9/11, ISIS currently. Hence, more border controls at airports and port cities (and reality TV programs devoted to security operations at airports, land border crossings, and ships in port). We have had to learn to accept increased airline surveillance, including full body scans, as a reasonable price for safer flying. At the same time, some analysts are growing increasingly concerned about governmental surveillance of the citizenry. They draw attention not just to the growing use of CCTV cameras in shopping malls, workplaces, hospitals and schools, but also to the electronic compilation of vast amounts of information from banking transactions, credit cards, driver's licences, and so on.

Since 2001, the federal government has introduced anti-terrorist legislation requiring, among other things, that telephone companies make available to law enforcement agencies the personal details of those who subscribe to their services—names, street and email addresses, telephone numbers, mobile phone identification numbers, and SIM card numbers. The murder of two members of the Canadian Armed Forces by self-styled ISIS supporters in October 2014 has undoubtedly hardened the resolve for tighter security measures.

The concern expressed by civil liberties watchdogs is that these measures will not just be used against terrorists but will also target other individuals and groups whose values and interests do not necessarily coincide with government and corporate interests, such as environmental groups, and activists opposed to big oil (Downes, Rock, and McCormick, 2012).

The heart of the problem is that surveillance policies and practices that successfully balance reasonable public safety concerns with the rights of ordinary citizens are difficult to design. Tracking people's Internet activity or scrutinizing their bank records may not be as obviously intrusive as an electronic bracelet on your ankle, but the intent is much the same.

TIME FOR REVIEW

1. What are the main societal responses to crime? What are their strengths and weaknesses?
2. How is it possible to reconcile the need for national security with respect for citizens' rights and civil liberties?

SUMMARY

1. **Are any societies free of crime and deviance?**
   No, criminal and deviant behaviour exists in all human societies. However, what counts as crime and deviance varies by time and place. Crime and deviance also vary by how serious they are judged to be. The more serious the offence, the more severe the punishment.

2. **How do sociologists study crime and deviance?**
   Crime and deviance can be studied as objective behaviours and as social constructs. Objectivist and constructionist perspectives tend to ask different, although not necessarily competing, questions about crime and deviance.

3. **How much crime and deviance is there?**
Much more than most of us think. Official counts of crime and deviance underestimate the amount of crime and deviance occurring in society. There is an inverse relationship between the seriousness of crime and deviance and the frequency of their occurrence. The homicide rate is generally regarded as the most valid and reliable measure of criminal activity.

4. **What factors predict criminal behaviour?**
Age, gender, class, and race are the most important predictors. However, correlation does not necessarily imply causation. Sociological theories of crime and deviance are designed to answer questions about causation.

5. **Are some groups of people the source of greater concern than others are with regard to their criminal and deviant activity?**
Since at least the end of the nineteenth century, young people have figured prominently in people's worries about crime and deviance. Sociologists are interested in why this is so (a constructionist question) and in the determinants of their deviant and criminal behaviour (an objectivist issue).

6. **How has Canadian society responded to crime and deviance?**
Imprisonment and other deterrence-based policies have been mainstays of the societal response to criminal behaviour. Research suggests that they are not very effective in reducing crime levels. Other anti-crime strategies focus on prevention. Increasingly, governments have sought to control the behaviour of their citizens with a variety of surveillance strategies.

QUESTIONS TO CONSIDER

1. When studying crime and deviance, must we choose between objectivist and constructionist approaches?
2. How are criminal statistics social constructions?
3. What is a moral panic? Why do moral panics often involve young people?
4. How has cyberspace changed crime and deviance and reactions to crime and deviance?
5. Why is studying reaction to crime and deviance often as important as studying criminal and deviant behaviour itself?
6. How do the mass media influence criminal and deviant behaviour?
7. What are the most important causes of crime?

GLOSSARY

The **certainty principle** (p. 317) is a component of deterrence theory that argues that it is the probability of punishment, rather than its severity, that dissuades potential offenders from breaking the law.

Conflict crime (p. 297) involves criminal acts that are subject to disagreement about the amount of harm they cause, how wrong they are, and how severely they should be punished.

Consensus crime (p. 297) involves criminal acts that are generally agreed to be seriously harmful, wrong, and deserving of severe penalty.

Control theory (p. 309) argues that crime and deviance are likely to occur when internal and external controls are weak or absent.

Crime (p. 296) is a breach of the criminal law that is liable to prosecution and punishment.

The **criminal justice system** (p. 296) comprises the social institutions charged with the task of apprehending, prosecuting, and punishing known offenders.

The **dark figure of crime** (p. 302) is the number of criminal incidents that take place but are unknown to the police.

Deterrence theory (p. 316) argues that the threat of punishment discourages criminal violations.

Deviance (p. 296) is the breaking of a norm.

Differential association (p. 309) theory proposes that criminal behaviour is learned through contact with other individuals and groups.

Labelling theorists (p. 299) believe that public identification of individuals as criminal or deviant leads to more crime or deviance by those individuals.

Moral panics (p. 312) are extreme reactions to crime and deviance.

Norms (p. 296) are rules that prescribe standards of behaviour.

In **observational studies** (p. 305) information about crime and deviance is collected by observing them.

Racial profiling (p. 307) is a selective enforcement of the law based on racial or ethnic characteristics of those apprehended by police officers.

Recidivism (p. 301) is repeat offending, following punishment or rehabilitation.

Routine activities theory (p. 311) argues that in addition to a motivated offender, criminal events require a suitable target and the absence of a capable guardian.

In **self-report studies** (p. 305), respondents report their involvements with crime and deviance as offenders and victims.

Social constructionism (p. 300) emphasizes the subjective qualities of crime and deviance, proposing that particular conditions are viewed as problematic only because some people—usually powerful ones—define them as such.

Social stigma (p. 297) is severe social disapproval of a person because of a particular trait that indicates their deviance from social norms. A damaged reputation or reduced social status usually results.

Strain theory (p. 307) argues that people are pressured into breaking rules because they have few opportunities to succeed in life by legitimate means.

Street crime (p. 306) refers to conventional violent and property crime. It is often contrasted with white-collar crime.

White-collar crime (p. 300) is crime committed by high-status people in the course of their careers.

CHAPTER 14

HEALTH AND AGING

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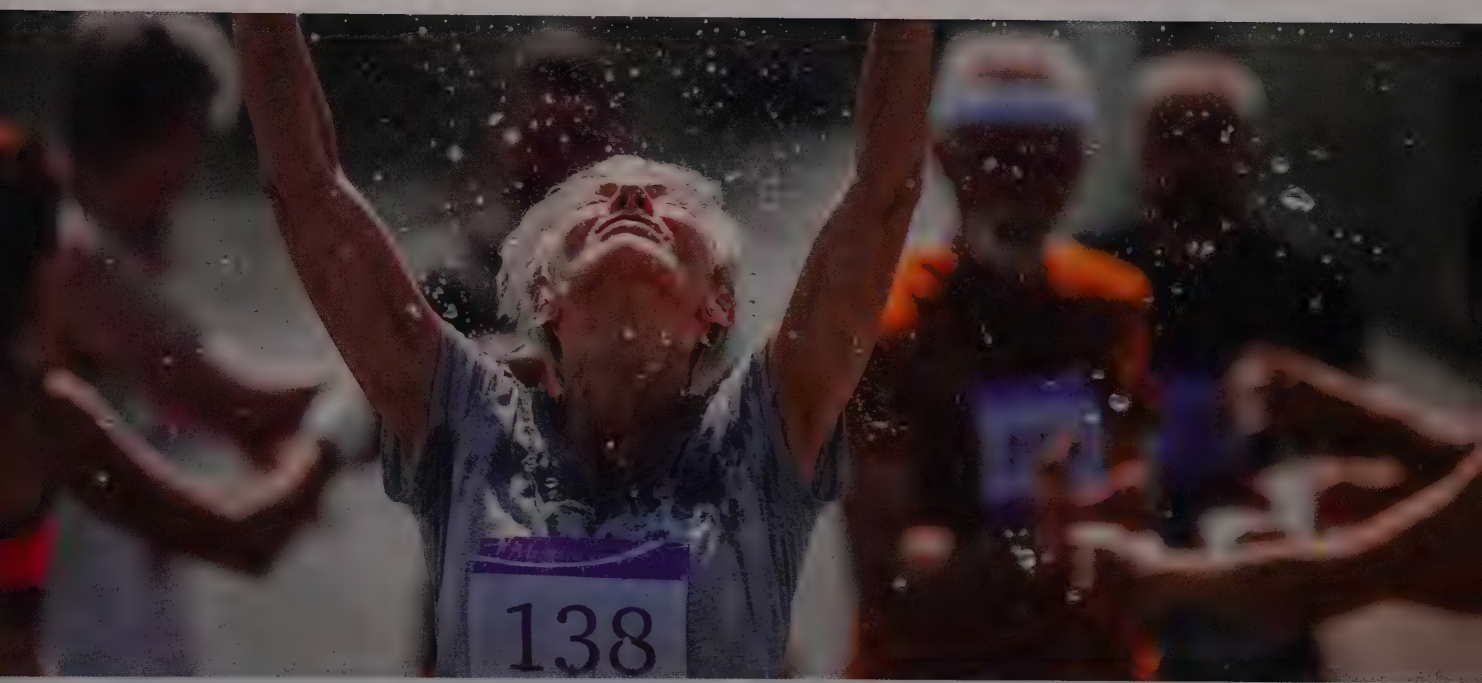

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AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Challenge common misconceptions about health and aging.
- Recognize age discrimination and its implications.
- Understand how social inequalities associated with age, gender, social class, Indigenous status, and other factors influence health.
- Assess the importance of self-care, informal or unpaid care by family members and friends, and formal medical and nonmedical healthcare services, for the provision of healthcare in later life.
- Evaluate claims regarding the benefits of public versus private provision of healthcare.

CHALLENGING COMMONSENSE BELIEFS ABOUT HEALTH AND AGING

Jean was born in 1925 on a small farm, one of seven children of a Swedish immigrant mother and a Métis father. She graduated from high school, finished a year of teacher's college, and returned home to marry John, whom she had met a few years earlier. John had been forced to quit school after Grade 8 to work on the family farm. Together, they settled on a small farm across the road from his parents. John dreamed of the day when he could buy more land and make a good living for himself and his family. Until then, he worked in the local steel mill, tending to the farm during the evening and on weekends. Meanwhile, Jean supported him in his work, taking care of their children and his parents, and doing various chores on the farm when she had time.

In 1953, John developed polio and spent the next year and a half in bed. Throughout his ordeal, Jean nursed him and cared for his parents. To make ends meet, she also worked the night shift as a nurse's aide at a local nursing home. Money was tight and there were numerous mouths to feed. With five children and another on the way, they were overjoyed when, after 12 years on the farm, they were able to add indoor plumbing. No more hand-washed diapers and no more running to the outhouse in the middle of winter! Living on a farm meant that although they could not afford much beyond necessities, there was always plenty to eat.

Over the years, economic circumstances improved as the children grew older and were able to help. Yet the years of poverty, hard work, and deprivation had left their mark. In 1991, at the age of 68, John died of a brain tumour. Although no one was sure, family members speculated about whether it had anything to do with the years spent working in the steel foundry and breathing in the chemical sprays that kept the weeds at bay on the farm. The pension that John earned at the steel mill did not provide Jean with much income, so she was forced to sell the family farm and rent an old house close to one of her daughters, whose children she cared for as her daughter worked. However, helping became increasingly difficult as Jean's health declined. Although she had quit smoking as soon as she heard about the problems it caused, she had developed a cough that would not go away. It left her winded, and she was unable to walk very far. For several years, she had also battled weight problems and was eventually diagnosed with diabetes. A year after moving, Jean suffered a stroke and died before she could get to the hospital. She was 69—old from the point of view of someone in the 20s but not in terms of the average life expectancy of women in Canada at the time. (**Life expectancy** is the number of years that the average person can expect to live.)

Jean's life story points to the many complexities we encounter when thinking about aging, health, and healthcare. When Jean died, people wondered why she hadn't taken better care of herself. Why did she let her weight go? Why hadn't she quit smoking before it became such a problem? Why had she opted to live in an area far from health services? After all, she was a bright and capable woman; if any woman could look after herself, it was Jean.

The assumption that Jean should have been able to make choices that would have been more beneficial to her health ignores the complex role of social-structural factors, such as social class, gender, age, ethnicity, and rural–urban residence, in defining the available range of choices and their implications for health and longevity. During and after the Depression and World War II, living and working conditions were often harsh. Gender also played an important role. At the time Jean and John were married, family fortunes were generally tied to men's occupations and income levels. The fact that Jean's work was largely unpaid and that she assumed responsibility for the care of other family members, continually placing their needs (including their health) above her own, was typical of the experience of women at the time. As a Métis woman, Jean may also have experienced additional barriers in her ability to gain access to employment, healthcare, and other resources. By the time John died, Jean was experiencing the accumulated health effects of her earlier life circumstances. However, old age and its associated low status also appear to have played a role, possibly undermining her health further by limiting access to economic resources, affordable housing, and appropriate healthcare.

Sociology offers a lens through which to examine the social factors linked to people's health and longevity as they age. This chapter discusses these issues. It brings together two areas of sociology often considered separately—the sociology of aging and the sociology of health and illness (also known as *medical sociology*). We can easily connect the two: Aging is often equated with, and defined in terms of, ill health. Health tends to be

At Confederation, average life expectancy in Canada was 42 years. In 2008, it approached 81 years. The number of people over the age of 64 has increased because of improved hygiene, sanitation, nutrition, and healthcare.

SOURCE: © Monkey Business Images/Shutterstock.

a major problem in later life, and older adults account for much of the illness, disability, and healthcare use in any society. (By "older adults" we follow convention and refer to people over the age of 64.)

We begin by focusing on individual and population aging and the role of social factors in influencing how people age. Next, we address health as people age, including the relations among social inequalities, health, healthcare, and aging. Finally, we examine health-related issues in Canada in the context of international and global trends in healthcare.

INDIVIDUAL AND POPULATION AGING

In 1920, Canadians lived to around 60 years of age (see Table 14.1). People can now expect to live more than 20 years longer than if they had been born in 1920. Once they reach age 65, they can expect to live even longer. The fact that almost everyone can expect to live to old age distinguishes our era from earlier historical periods. In the past, some individuals lived as long as people live today, but never before has the vast majority lived to old age. With most of us now living to old age, it will not surprise you that older adults represent an increasing proportion of the Canadian population. In 1921, just over 5 percent of the population was age 65 and over. In 2016, this cohort represented almost 17 percent of the Canadian population (Statistics Canada, 2017). It is projected to

TABLE 14.1 Life Expectancy by Birth Cohort, Canada, 1920–2016

YEAR	LIFE EXPECTANCY AT ...					
	BIRTH FOR WOMEN	65 FOR WOMEN	BIRTH FOR MEN	65 FOR MEN	BIRTH FOR POPULATION	65 FOR POPULATION
1920–22	61	79	59	78	60	78
1930–32	62	79	60	78	61	78
1940–42	66	79	63	78	65	79
1950–52	71	80	66	78	69	79
1960–62	74	81	68	79	71	80
1970–72	77	83	69	79	73	81
1980–82	79	84	72	80	75	82
1990–92	81	85	75	81	78	83
2000–02	82	85	77	82	79	84
2010–12	84	87	79	84	82	85
2014–16	84	87	80	84	82	86

SOURCES: Nagnur (1986); Statistics Canada (2018).

constitute over one-quarter of the population by 2036 (Statistics Canada, 2010).

The main reason for the increasing proportion of older adults in the population is the decline in the number of children born, from just under four children per woman on average in the mid-1950s, to about 1.5 children per woman on average today (Provencher et al., 2018). With declines in the number and proportion of children in the population, the proportion of older people necessarily increases. Moreover, declines in the **mortality rate** (deaths per 1000 people in a population) are now concentrated in older age cohorts, resulting in relatively larger older age groups that contribute yet more to population aging (Chappell, McDonald, and Stones, 2008).

We now live much of our lives assuming that an extended future lies before us. Consequently, forward thinking has become realistic. Most of us now are members of multigenerational families. Unlike in the past, young people today often know their grandparents and even their great-grandparents. Increased longevity also means that the illnesses and disabilities accompanying old age are more prominent and that different demands are placed on the healthcare system than was the case when fewer people lived to old age. Longer life expectancy results in more healthcare and service jobs for the younger generation. It affects when people retire and what they do after they retire. Now that mandatory retirement has disappeared from nearly all Canadian provinces and territories, more people will likely continue to be employed into their 70s and even their 80s (see Figure 14.1).

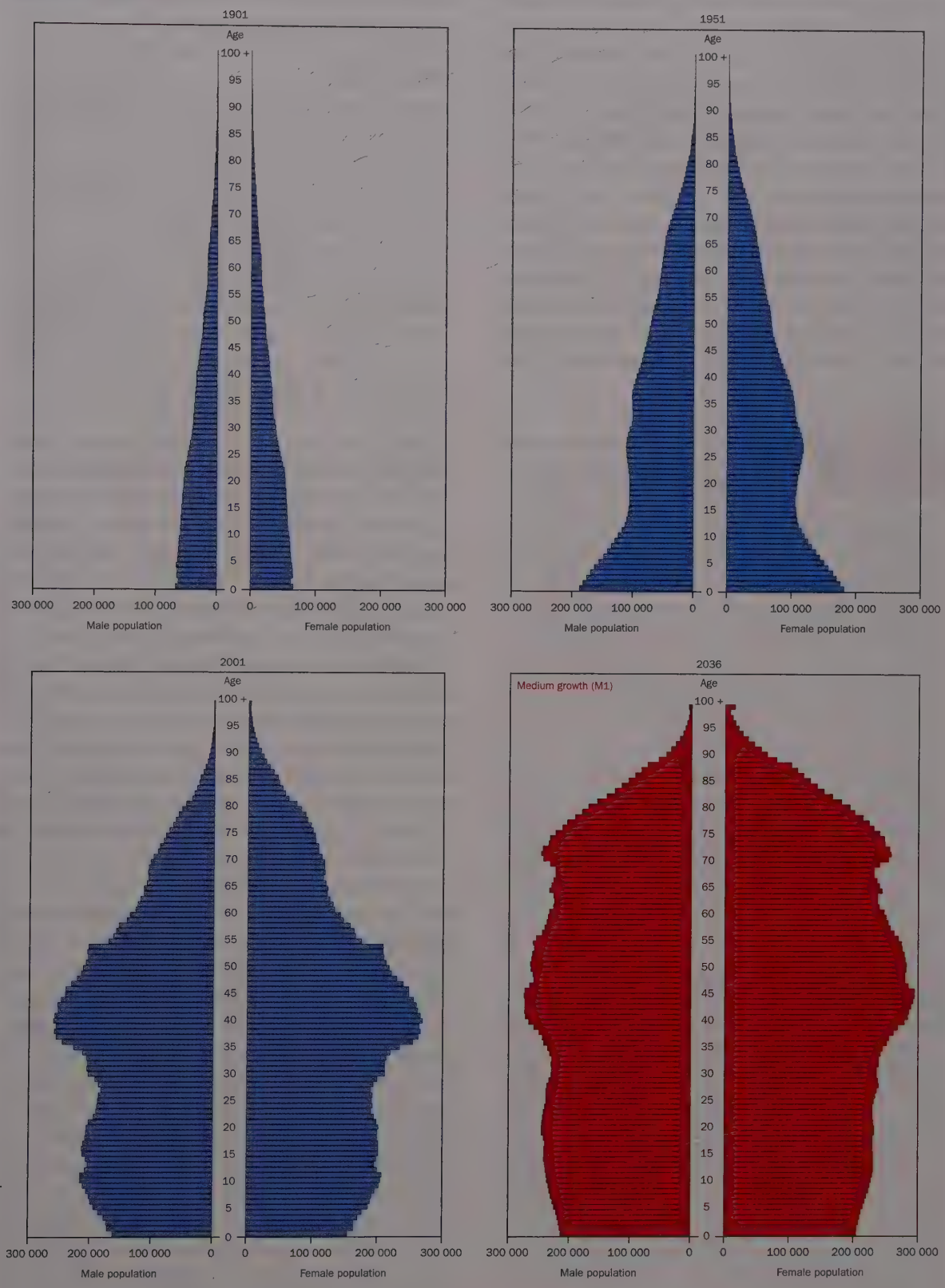
The social construction of old age—how society views older adults and the opportunities and constraints that they face—influences how older adults experience life. In contemporary Western societies, we tend to stereotype and discriminate against people based on age, a tendency referred to as **ageism**. We are inclined to see older adults as physically unattractive; unhealthy; having no interest in, or capacity for, sexual relations; being socially isolated and lonely; and lacking a full range of abilities in the workplace. Researchers have documented ageism in people's attitudes toward older people, in media and dramatic portrayals, humour, healthcare, work environments, and legal processes (Chappell, McDonald, and Stones, 2008). Some have called it a "quiet epidemic" that contributes to indifference (Stones and Stones, 1997). However, ageism speaks to our treatment of older people as a social category and not necessarily to interpersonal antagonism. So we may treat our grandmothers well while also referring to and treating other older adults with indifference or even contempt.

Ageism is not experienced in the same way by everyone. Rather, it varies by gender, race, ethnicity, social class, and sexual orientation. Women are often considered "old" at a much younger age than are men and being considered old is often viewed more negatively among women (Calasanti, 2005). The bodily changes often considered to be signs of aging and old age (such as gray hair, wrinkles, and weight gain) are considered unattractive, and women tend to be judged based on their physical or sexual attractiveness. Some older women consider not having to focus on their appearance as liberating (Chrisler, 2007). However, our society tends to equate looking good with being healthy (Calasanti et al., 2018). Consequently, people often resort to the use of products and services such as cosmetics, drugs, and surgery that claim to be able to prevent or reverse aging. Yet, as one author notes, there is a difference between trying to be healthy and trying to be "not old:" "the anti-aging industry does not combat ageism. Instead, it reflects and reshapes ageism—reinforcing the belief that old age is repugnant and promising relief to those who can pay enough" (Calasanti, 2005: 11).

Ageism exists for several reasons. Some analysts point to the importance of structural factors, such as the segregation of young and old age cohorts and the fact that most older adults in Canada are not in the paid labour force and are therefore considered to be nonproductive members of society. Segregation can also result in a lack of knowledge about, and interaction with, older people. That also contributes to ageism (Hagestad and Uhlenberg, 2005). So people who have had positive interactions with older people and those who have learned about aging tend to have fewer negative attitudes toward older adults (Ferraro et al., 2008). Finally, ageism is attributable in part to people's fear of their own future. Old age is associated with declining health, both physical and mental, and with death. Old age has been "medicalized" and aging tends to be equated with disease.

Medicalization refers to the process whereby more and more areas of life come under the control of medicine (Zola, 1983). Families and the clergy used to deal with various social issues, including alcoholism and mental health problems, that are now the province of medical authorities. The same holds for aging. Once considered a natural process, aging is now treated largely as a disease requiring medical

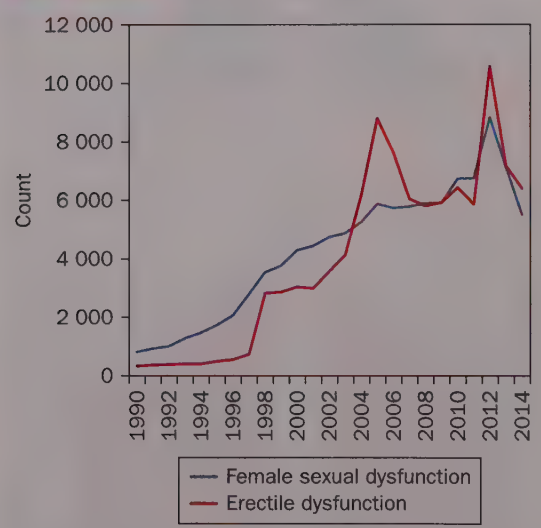
FIGURE 14.1 Canadian Population Age Structure, 1901–2036



SOURCES: Statistics Canada, *Census of Population, 1851 to 2016*; Statistics Canada, *Population Projections for Canada (2013 to 2063), Provinces and Territories (2013 to 2038)*, 91-520-X, for the data from 2017 to 2036. Available at https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/pyramid/pyramid.cfm?geo1=01&type=1.

intervention (Estes and Binney, 1989; Kaufman, Shim, and Russ, 2004; Figure 14.2). For example, prescription medications and other drugs are widely used in Canada, particularly by older adults. Over three-quarters of older adults living in the community and almost all older adults living in nursing homes or other institutions report having used one or more medications in the past two days (Ramage-Morin, 2009). In the United States, studies show that older adults use more prescription and over-the-counter drugs than do younger adults, increasing the risk of misuse and abuse. According to one study of middle-aged and older adults, 36 percent of women and 37 percent of men use at least five prescription medications at the same time (Qato et al., 2008). Of course, medicine still cannot cure much of what happens during old age—a cure does not exist for Alzheimer's disease, and treatments for cancer are often ineffective—but we invest the bulk of our energies on finding medical cures for these and other ailments.

FIGURE 14.2 Occurrence of the Terms *Female Sexual Dysfunction* and *Erectile Dysfunction* in the ProQuest Database, 1990–2014



Declining interest in sexual activity and ability to engage in sexual intercourse were considered normal aspects of aging until the 1990s, when female sexual dysfunction and erectile dysfunction became medicalized, that is, the subject of intense and growing medical and pharmaceutical interest. Viagra was first marketed in 1998 and the search for a female equivalent continues today. The pharmaceutical industry had to invest many millions of dollars on advertising to turn what was thought to be a natural problem into what is now widely regarded as a medical issue. This graph traces the transformation by showing how many times the medical phrases *female sexual dysfunction* and *erectile dysfunction* were mentioned in the ProQuest database every year from 1990 through 2014. The database contains the full text of 22 049 different newspapers, magazines, and academic journals in the sciences, social sciences, and humanities. Data for 2014 were collected on December 4 and extrapolated to December 31. That is, with 7.4 percent of 2014 not included in the count, the figures for 2014 were increased by 7.4 percent (ProQuest, 2014).

SOURCE: ProQuest (2014).

TIME FOR REVIEW

1. How is an aging population reflected in the changing shape of population pyramids over time (see Figure 14.1)?
2. In what sense is an aging society an achievement to be celebrated?
3. In what sense is an aging society a social problem requiring solution?
4. What is medicalization and how does it influence our attitudes toward, and treatment of, old age?

HEALTH AND OLD AGE

Old age tends to be associated with declining health. However, contrary to popular belief, the majority of older adults are not in poor health. Nor do psychological and emotional health and social well-being necessarily deteriorate in step with deteriorating physical health.

The probability of having one or more long-term health conditions increases with age. About one-half of Canadians between the ages of 45 and 64, and three-quarters of Canadians over the age of 64 have at least one chronic condition (Canadian Institute for Health Information, 2011). The most common conditions experienced in later life include high blood pressure, arthritis, back problems, eye problems (such as cataracts), and heart disease (Canadian Institute for Health Information, 2011).

However, these conditions do not necessarily interfere with day-to-day functioning. **Functional disability** exists when a health problem interferes with day-to-day functioning. For the most part, older Canadians consider themselves to be in good functional health based on levels of vision, hearing, speech, mobility, dexterity, feelings, cognition, and pain. Almost two-thirds of Canadians over the age of 65 report having very good or excellent functional health (Public Health Agency of Canada, 2010).

Mental health is "the capacity of each of us to feel, think and act in ways that enhance our ability to enjoy life and deal with the challenges we face" (Public Health Agency of Canada, 2010). Mental health and physical health are related. People in good physical health tend to enjoy good mental health. Therefore, as people age and their physical health

declines, we would expect their mental health to decline as well. However, research suggests that is not the case. Some studies have found that people's overall level of happiness tends to decrease after age 24, reaching a low among 35- to 44-year-olds, and then increases again so that 55- to 64-year-olds are as happy as 18- to 24-year-olds. People over the age of 64 are even happier (Helliwell, 2003). In 2008, fully 79 percent of older women and 77 percent of older men said they were happy (Milan and Vézina, 2011).

In addition, over 90 percent of older adults reported being satisfied with their lives compared to 84 percent of 15- to 24-year-olds (Statistics Canada, 2005). More recently, Gilmour (2014) reported a positive relationship between age and "complete mental health." More than 78 percent of Canadians aged 65 and older were found to be mentally healthy. This was somewhat less true of younger and middle-aged adults.

Self-esteem and feelings of mastery or control also seem to improve with age, peaking in middle age, followed by a modest decline in later life (Statistics Canada, 2001, 2007a). It is unclear why older adults often have such good mental and emotional health. Part of the answer may involve selection bias: Surveys necessarily exclude people who died prematurely because of ill health, a disproportionately large number of whom may have been unhappy. Moreover, the older people who participate in surveys may have learned to cope with the exigencies of life or to compare themselves with those who are worse off, including those who have died. Perhaps the importance of material and physical matters wanes over time.

Although older adults generally enjoy good mental health, some experience mental disorders such as depression and cognitive impairment. These ailments tend to be linked to abuse and poverty early in life and increasing grief, poor physical health, institutionalization, isolation, and loneliness in the later years (Public Health Agency of Canada, 2010). Mental disorders often have physical causes. Dementia, or loss of cognitive function, is one example. In Canada, about one in eleven adults over the age of 64 has some form of dementia, including Alzheimer's disease (Canadian Institute for Health Information, 2011). About three-quarters of older adults with dementia live in long-term care facilities. These rates increase with age (Dubois and Hébert, 2006).

A minority of older adults, particularly those who are poor, very old, and cognitively, mentally or physically frail, are vulnerable to problems of social isolation and/or elder abuse. However, the implications for those who are isolated or victimized and for society as a whole can be severe and point to the seriousness of the problem as a public health issue (Cloutier-Fisher and Kobayashi, 2009; McDonald, 2011). Social isolation draws attention to the quality and quantity of an individual's social contacts, including family members and/or friends. One study reports that just under one-fifth of older adults in Canada who are not living in nursing homes or other institutions can be considered physically and socially isolated (Cloutier-Fisher and Kobayashi, 2009). Elder abuse can include such things as physical abuse, psychological or emotional abuse, financial or material exploitation, sexual abuse, and neglect. The extent of elder abuse in Canada remains unknown (McDonald, 2011). However, international studies show that, on average, more than 14 percent of older adults report having experienced some form of elder abuse over the past year (Pillemer et al., 2016).

Despite evidence that some older adults experience social isolation and abuse, in general, the lives of older adults are characterized by social integration and support, not social isolation and abuse or neglect. Most older adults in our society are embedded in **modified extended family** networks (Litwak, 1960) characterized by mutual and close intergenerational ties, responsible filial behaviour, and contact between generations. Sociological research conducted over the past three decades has debunked the notion that families abandon their older members. Most older adults enjoy extensive social contacts, live close to at least one of their children, and have a convoy of close friends and confidantes they can draw on for support (Antonucci, 1990).

Evidence that an increasing proportion of older adults is enjoying good health has led sociologists to introduce the **compression of morbidity hypothesis**, which holds that, in the future, we may be able to postpone the onset of chronic disability to the point where most people will be able to live relatively healthy lives until very shortly before death, when they will experience rapid deterioration (Fries, 1983). Recent research suggests that although we are far from a dependency-free old age, many Canadians are experiencing a later age of onset of functional limitations. This is good news, especially if the trend continues. Unfortunately, however, the vagaries of old age are not evenly distributed, as we will now see.

INEQUALITY, HEALTH, AND AGING

Research suggests that in recent decades the declining death rate has been steeper in some segments of the population than in others (Schalick et al., 2000). In general, people with more education, income, and wealth live longer than others do. They also tend to spend a greater proportion of their lives in good health.

Education

People with more education are able to avoid or postpone disability to a greater extent than are those with less education, although education may be less beneficial once disability is present (Huisman et al., 2005). People with a university degree often feel healthy and function well late into their 70s and 80s, whereas those with less education do not (Ross and Wu, 1996). One Canadian study focused on changes in health over a three-year period among adults aged 50 and over, all of whom were in good health in the first year. It found that the likelihood of remaining in good health was greater among men and women in the highest educational groups (Buckley et al., 2005).

Income

Income is also important to health. One report shows that men with the lowest 5 percent of earnings before retirement are twice as likely to die between 65 and 70 years of age as are men with the highest 5 percent of earnings. High-income earners experience considerably more years of good health than those with lower incomes, with some reporting as much as a 12-year difference (Segall and Chappell, 2000). The pattern holds among older adults. Low-income, older adults with disabilities tend to be more disabled than are their high-income counterparts. As a result, even though people with low income are less likely to live to old age, those who do are more likely to be institutionalized in long-term-care facilities than are those with higher incomes (Trottier et al., 2000).

Gender

In Canada, women tend to live longer than men do. However, they also appear to be less healthy than men. Women report more multiple health problems associated with chronic conditions, such as arthritis and rheumatism, high blood pressure, back problems, and allergies (Chappell, McDonald, and Stones, 2008). Although the likelihood of disability increases with age for both men and women, women are more likely to report limitations in activities of daily living or disability in later life than men are (Gilmour and Park, 2006). Women also report more severe disability than men do. That is, although men have lower life expectancy, they live a greater proportion of their lives without disabling conditions. Although evidence suggests that men and women experience similar levels of mental health problems, they may manifest them differently—for example, as depression in women and as alcohol and drug abuse or suicidal behaviour in men (Simon, 2000).

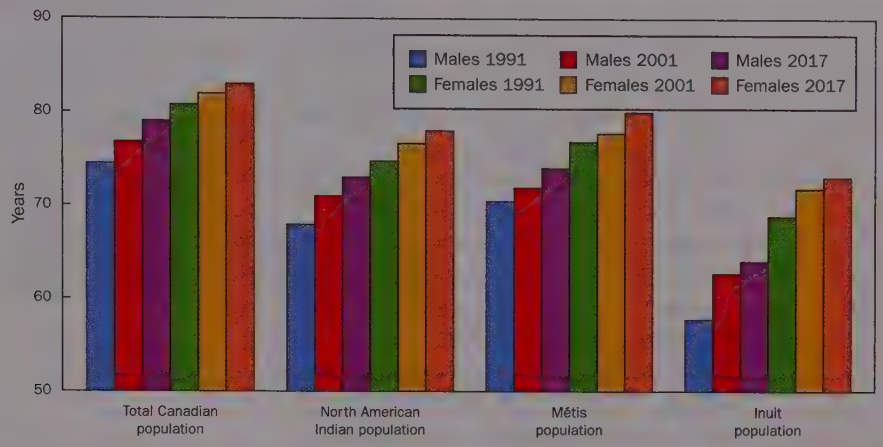
Why are men more likely to die while women are more likely to report poor health? Is it because they suffer from different health problems, with those that affect men being more deadly? Perhaps, although many of the major causes of death appear to be similar among men and women. Some attribute the difference to gendered differences in health-related behaviours and responses to illness. For example, women appear more likely to pursue various preventative health practices and seek medical care and treatment when they fall ill. In contrast, it has been suggested that men's socialization and lifestyles are likely to expose them to risky and dangerous behaviours that jeopardize their health and longevity. In fact, men's higher rates of mortality have been linked to higher rates of preventable deaths (e.g., deaths due to car accidents, suicides, violence, and smoking-related causes such as lung cancer and other lung diseases) (DesMeules, Manuel, and Cho, 2004; DesMeules, Turner, and Cho, 2004; Gilmour and Park, 2006). As one author notes, "the desire to uphold hegemonic ideals of independence, self-reliance, and imperviousness to pain and illness are embedded in . . . men's health-related beliefs and behaviors. Ill health and help seeking are often perceived as a threat to the masculine identity, and taking action for health is considered only when health status jeopardizes independence" (Tannenbaum and Frank, 2011: 243). Yet gaps in the male–female mortality rate seem to be decreasing over time, due in part to a decline in gendered differences in smoking.

Indigenous Status

In Canada, big differences exist between Indigenous and non-Indigenous adults in terms of health and well-being. Although the gap appears to have decreased somewhat in recent years, the life expectancy of Indigenous Canadians currently remains six years less than that of non-Indigenous Canadians (Cooke et al., 2007). Differences are also evident *within* the Indigenous population (see Figure 14.3).

Indigenous populations suffer from more chronic illnesses, including heart disease and diabetes, than

FIGURE 14.3 Aboriginal and Non-Aboriginal Canadians' Life Expectancy at Birth by Sex, 1991, 2001, and 2017 (projected)



SOURCE: Statistics Canada (2007b; 2010).

non-Indigenous populations do (Wilson et al., 2010). They also have higher disability levels. In 2001, 70 percent of Indigenous adults aged 65 and over living off-reserve reported one or more disabilities, including difficulties hearing, seeing, walking, climbing stairs, bending, and doing various other activities, nearly twice the rate for non-Indigenous people of the same age (Statistics Canada, 2007b). Although the majority of older Canadian adults rate their health as excellent or very good, fewer than half of non-reserve Indigenous adults over the age of 64 report having excellent or very good health.

Reasons for these differences in health and life expectancy are numerous. In Indigenous populations, death from infectious and parasitic diseases is associated with inadequate housing and unsanitary conditions. According to one government report, over 50 percent of Indigenous community water systems pose a high or medium risk to the health of community members (Auditor General, 2011, Section 4.34). Suicide rates are also high, as are death rates from drowning, fire, homicide, and motor vehicle accidents (Allard, Wilkins, and Berthelot, 2004). Racism and discrimination increase the risk of psychological distress, depression, and unemployment, and lack of access to opportunities and resources is conducive to poor health (Noh et al., 1999).

The life expectancy of Indigenous Canadians is about six years less than that of non-Indigenous Canadians.

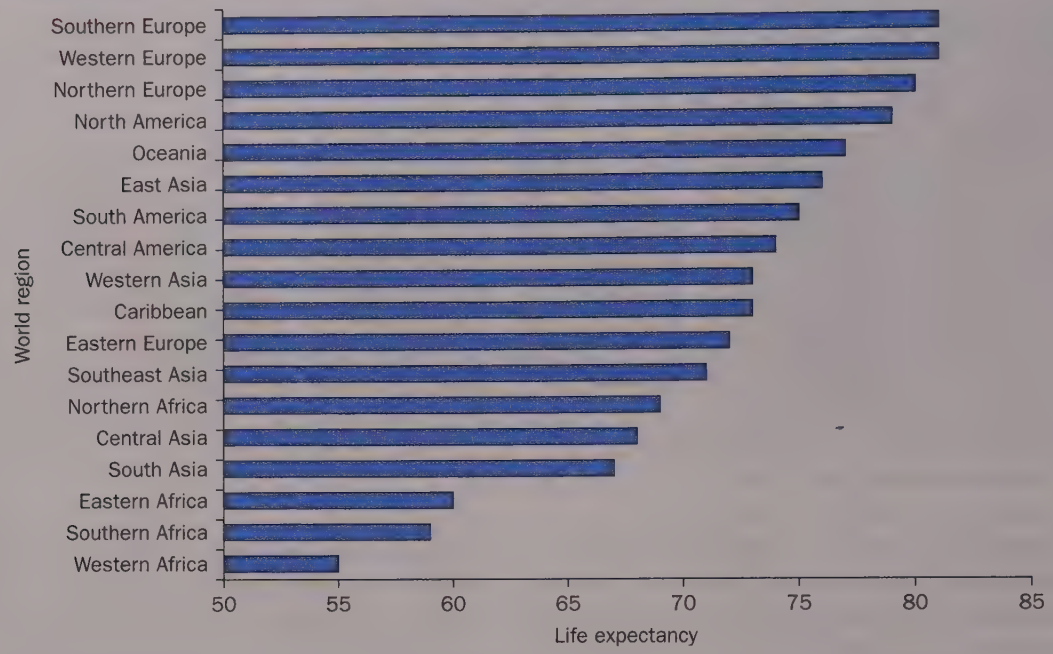
SOURCE: © Ton Koene/Alamy.

Race, Ethnicity, and Immigration Status

Health inequities are also evident when we compare racial, ethnic and immigrant groups. Health and longevity vary widely from one country or one region of the world to the next (see Figure 14.4). Less than one-quarter of Canadians aged 65 and over who were born in Canada, the United States, Europe, Australia, and Asia report fair or poor health. This percentage is considerably higher (about 33 percent) among those born in Central and South America and Africa (Chappell, McDonald, and Stones, 2008). Interestingly, however, immigrants, especially recent arrivals, generally appear to enjoy better health than their Canadian-born counterparts do, a pattern observed to varying degrees for such health outcomes as chronic diseases, disability, dependency, life expectancy, and disability-free life expectancy (Chen, Ng, and Wilkins, 1996).

The **healthy immigrant effect** may seem surprising at first glance. However, it likely reflects the fact that healthier people are more likely to migrate

FIGURE 14.4 Life Expectancy by World Region, 2013



At birth, the average life expectancy in Canada is 82 years.

SOURCE: Carl Haub and Toshiko Kaneda, *2014, World Population Data Sheet* (Washington: Population Reference Bureau, 2014).

and that the Canadian government requirement that potential immigrants meet a minimum standard of health before being admitted to the country. Immigrants who have lived in Canada for a long period do not have a similar advantage. In fact, older immigrants have worse self-rated health and more disability/functional limitations than older Canadian-born adults do (Vang et al., 2015). Does this mean that immigrants' health tends to decline after immigration? In fact, this seems to be what is taking place (Pérez, 2002). The search is on for explanations of this phenomenon. Most analysts focus on the negative health implications of changes in diet and activity levels, discrimination, declines in income and other resources, and difficulties in accessing healthcare services in the years immediately following immigration (Gee, Kobayashi, and Prus, 2004).

EXPLAINING SOCIAL INEQUALITIES IN HEALTH

What exactly is it about age, gender, Indigenous status, ethnicity, race, social class, and other inequalities that result in poorer health? Early research focused on biological explanations and on differences associated with health services use, including differences in the likelihood that people would follow doctors' orders and inequalities in access to healthcare services. Indeed, the view that creating an equitable healthcare system would eliminate or at least reduce health inequalities was a major argument for the creation of a universal healthcare system in this country. More recently, evidence that inequalities in health and longevity have persisted despite the introduction of a universal healthcare system has led to renewed attempts to account for such differences.

Some researchers have offered explanations that are specific to one or another type of inequality. Others have focused on explanations associated with many sources of inequality. In general, the literature highlights three types of explanations: one focusing on individual health behaviours and lifestyles, one on social psychological resources, and one on material conditions and resources.

Many researchers argue that health inequalities reflect the impact of individual behaviours and lifestyles, including whether people smoke, consume excessive amounts of alcohol, eat foods high in fat and

When surveyed, Canadians correctly identified smoking, eating patterns, weight, experience of stress, and exercise habits as the major determinants of health.

SOURCE: © Andrey_Popov/Shutterstock.

sugar, and lack regular exercise. People often consider lifestyles to be freely chosen. For example, one survey asked Canadians what the major determinants of health are. The most common responses referred to such factors as those just listed (Canadian Institute for Health Information, 2005).

Although research finds a link between social location and lifestyle factors, sociologists often criticize such explanations because they ignore how social inequalities can trump individual decisions in determining health outcomes. Thus, studies comparing the importance of individual decisions against social factors, such as income adequacy, often find that the latter are more important (House, 2001; Williamson, 2000). Moreover, when researchers focus on individual decision making, they often neglect the fact that people rarely make choices freely from a full range of possible options. We can criticize low-income earners for failing to exercise more, but only if we ignore that they may live in neighbourhoods where an evening jog is dangerous, affordable recreational facilities don't exist, and lack of child-care options means they have little time for such pursuits in any event. As this example shows, social inequalities structure choices. Attending only to individual decision making often amounts to blaming victims for the effects of structured social inequalities.

A second explanation for how social location generates health inequalities draws attention to the role of stress and other psychosocial factors, including depression and perceptions of relative deprivation. From this perspective, inequality and lack of access to economic and other resources generate stress, leading to poor health. In addition, some analysts argue that more than poverty is at work here. They note that if poverty were the only problem, we would expect to find substantial differences in health between the poor and the non-poor, but little or no difference between those who are only moderately well off versus those who are wealthy. Yet this is not the case. Instead, each increment in income brings additional health advantages.

This finding suggests that it is not just poverty but the *perception* or *awareness* of inequality that leads to bad health. This is the **hierarchy stress perspective**, which suggests that when people compare their situation with that of others and see their situation negatively, they experience stress and their health declines (Link and Phelan, 2000). In addition to causing poor health, stress can operate indirectly by leading people to smoke tobacco, consume too much alcohol, eat too much or too little, sleep too little, and take dangerous drugs—all of which eventually have a negative impact on health in their own right (Link and Phelan, 2000).

Finally, some explanations emphasize material conditions and resources as the mechanisms linking people's social locations to health outcomes. Such arguments hold that people's social class, age, gender, race, and ethnicity contribute to differential access to a range of resources that contribute to good or poor health. These resources include enough income to buy nutritious food, enough education to be aware of health issues (such as what constitutes a nutritious diet), access to means of illness prevention, the ability to avoid risk factors (such as living in environments where dangerous chemicals are present), and so on (Link and Phelan, 2000).

Some researchers operating in this tradition insist that we should focus less on the resources that contribute to good or poor health and more on the way social class, age, gender, race, and ethnicity directly contribute to "systematic material, social, cultural, and political exclusion from mainstream society" (Raphael, 2005: 4). These structural factors are therefore considered to be fundamental causes of health status, influencing access to health-related resources, that, in turn, influence health (Link and Phelan, 2000; see Critical Sociology: Why We Haven't Won the War on Cancer).

Debate continues regarding whether individual behaviours and lifestyle characteristics, stress and other psychosocial factors, or material conditions and resources are more important for understanding inequalities in health. The answer may well be "All

Critical Sociology

WHY WE HAVEN'T WON THE WAR ON CANCER

Genes by themselves are responsible for just 5 to 10 percent of all cancers and a substantially smaller percentage of cancers in people over the age of 25. In other words, although genetic mutations cause all cancers, environmental factors cause more than 90 percent of the genetic mutations leading to cancer. "Environment" in this context means anything that people interact with, including exposures resulting from what we eat, drink, or smoke; natural and medical radiation; drugs; socioeconomic factors that affect exposures and susceptibility; and substances in air, water, and soil.

If environmental carcinogens cause more than 90 percent of the genetic mutations resulting in cancer, it follows that we can win the war on cancer by eliminating the offending substances or at least drastically reducing their prevalence and our contact with them. Unfortunately, the structure of our society makes it difficult for us to take preventive measures, partly because many people lack the resources that would allow them to, partly because industry and government resist change. This is the cancer paradox: Although we know how to reduce the cancer incidence rate drastically, we have not been able to do so.

For example, tobacco consumption and poor diet (especially consuming too much red meat, animal fat, salt, sugar, and alcohol) cause more than 60 percent of cancers. Environmental pollution and exposure to hazardous substances at work account for another 10 percent or so. However, people who avoid these hazards tend to be comparatively well educated and well to do.

Even when low-income and less educated people know about the need to stop smoking and improve their diets, urging them to do so tends to have little effect. That is because the conditions of their existence conspire against them. At work, they are more likely to experience little control and high stress than higher-income and better-educated people are. At home, they are more likely to face marital stress and divorce because of money problems. They are therefore more likely to turn to tobacco and alcohol to help them feel better in the short term.

They are also more likely than better-educated and higher-income people are to be exposed to carcinogens at work. Miners, construction workers, people who work with asbestos, welders, petroleum refinery workers, rubber industry workers, textile industry workers, footwear production and repair workers, hairdressers, farmers, paint manufacturing workers, house painters, furniture and cabinet makers, machine shop workers, and garage mechanics all have elevated cancer incidence rates. In their neighbourhoods, they tend to suffer relatively high exposure to air and water pollutants that contribute to cancer risk because on average they live closer to dirty industries and industrial waste sites than others do. Because of their low income, they often find that unhealthy foods are within their budget and healthy foods are too expensive. The notion that people in such circumstances are free to lower their cancer risk is naive to say the least.

Given the situation just described, you might think that governments and voluntary associations concerned with cancer would be investing heavily in research on how disadvantaged people can gain the educational, organizational, and political resources needed to change health, environmental, industrial, and social policy in a way that would lower their exposure to cancer risk. However, if we break down the $402 million that the Canadian government and voluntary associations spent in 2007 on cancer research, we find nothing of the kind. Some 55.1 percent of this sum went to investigating the biological causes of the disease. Another 43.1 percent went to research on detection, diagnosis, prognosis, treatment, and related efforts. Just 1.8 percent—$7 million—was allocated to work on prevention. These sums refer just to research budgets. If we added the medical costs of dealing with cancer, the imbalance between the massive effort aimed at cure versus the paltry effort aimed at prevention would be even more glaring.

Funding priorities remain what they are because powerful industrial interests, governments, and segments of the population benefit economically from a bias toward finding cures rather than taking preventive action. A reorientation of policy would cause them financial harm. For example, cleaning up cancer "hot spots," such as Windsor, Ontario, and Sarnia, Ontario; Fort Chipewyan, Alberta; and Sydney, Nova Scotia, would involve massive expense and industrial dislocation on the part of major petrochemical and other companies. Or consider the cost of creating a string of "wellness centres" in low-income neighbourhoods across Canada to equalize opportunities across classes for good health and longevity. Such neighbourhood institutions could offer tasty and healthy meals for the same price as a Big Mac, medium fries, and a Coke, with menus formulated to suit the ethnic tastes of area residents. They could offer free nicotine patches and support groups for people wanting to quit smoking; free on-site cancer screening facilities; free counselling

(*continued*)

(continued)

services for people facing marital or work-related stress; free competitive and instructional basketball, soccer, dance, and swimming activities for all age groups; and ads everywhere (multilingual where necessary) featuring famous role models promoting the new centres. How would McDonald's respond to the competition? How would taxpayers (most of them middle-, upper-middle, and upper-class) respond to the required expense?

Critical Thinking Questions

1. What are some things that you can do to minimize your risk of cancer?
2. Anti-smoking policies would seem to represent an area where governmental and powerful industrial interests differ. Why is it that governments have introduced policies detrimental to industry's interests in this area but not in others?

SOURCE: From BRYM. *Sociology as a Life or Death Issue*, 2E. © 2012 Nelson Education Ltd. Reproduced by permission. www.cengage.com/permissions.

of the above." As one study notes, "material conditions are intimately tied to psychological states, health behaviors, and social circumstances that also influence health," and we can see "these psychosocial states and health behaviors . . . as responses to adverse conditions imposed by broader social and economic structures" (Lynch and Kaplan, 2000: 25).

INTERSECTING INEQUALITIES AND HEALTH OVER THE LIFE COURSE

Increasingly, sociologists are interested in the effects of multiple statuses or inequalities on health outcomes. For example, the **age as leveller hypothesis** argues that age effects cut across all other statuses, in effect levelling inequalities from earlier in life. The competing **multiple jeopardy hypothesis** argues that the effects of membership in multiple low-status groups are cumulative. Thus, being female and old has more negative consequences than being either female *or* old (Chappell and Penning, 2009).

More recently, researchers have argued that statuses cannot simply be added together to judge their effects. Instead, the **intersectionality hypothesis** argues that health inequities result from the intersection of different social locations (Hankivsky and Cormier, 2009; McMullin, 2004). For example, annual income influences health but does so differently for men and women. Living in poverty has a stronger negative effect on women's health than on men's health (Prus and Gee, 2002). As a result, the greatest differences in life expectancy between men and women occur in the poorest areas of the country (DesMeules, Manuel, and Cho, 2004). Thus, in this example, health inequity results from the intersection of annual income and gender. Similarly, Indigenous status and age intersect so that the gap in health status between Indigenous people and the rest of the Canadian population widens in older age groups (Statistics Canada, 2003).

Conversely, some factors shrink health inequalities later in life. For example, the gap between upper- and lower-income groups increases as people reach their middle years (40s, 50s, and 60s) and declines thereafter (Martel et al., 2005). Does this mean that socioeconomic inequalities in health diminish with age? This seems unlikely because many poor people die before reaching old age, a fact that comparisons of the health status of survivors ignores.

Finally, we note that, as a person ages, the social and economic factors that influence health may change. According to the **life course perspective**, the circumstances experienced at all stages of life (including infancy, childhood, adolescence, young adulthood, and later adulthood) combine to influence what happens in later life. Some events and circumstances experienced earlier in life (for example, a car accident that leaves a person unable to walk) will affect that person's health for life regardless of what else happens later on. However, the impact of other events or circumstances is likely to accumulate gradually over the life course. Over time, a person may experience a number of events or situations (such as a car accident, subsequent unemployment, or the death of a spouse) that may have a negative impact on health. These events may be unrelated to one another. However, it is common for adverse exposures to be related. Children born into poor social and economic circumstances are more likely to have low birth weights, be exposed to poor diets, experience passive smoke exposure, and have below-average educational opportunities. These early life experiences are likely to continue in adulthood. Longevity and health in later life are likely to be products of all these factors.

TIME FOR REVIEW

1. What are the implications of gender, social class, and ethnic differences for health in later life?
2. Assess the importance of individual health behaviours or lifestyles, social psychological factors, and material conditions and resources for an understanding of social inequalities in health.
3. Compare and contrast the multiple jeopardy and intersectionality hypotheses for understanding differences in the health of Indigenous and non-Indigenous men and women in later life.

HEALTHCARE

How we view the causes of health problems influences how we deal with them. If we see the health problems of older adults as the result of what happens only in later life, we will target interventions to older adults. If we adopt a life course perspective and conclude that many of the health problems of older adults have their roots in lifelong experiences, we will want to address what happens early in life as well. If we attribute health problems to freely chosen personal behaviours, we will consider older adults responsible for their own health problems and will likely implement solutions aimed at educating people to make better choices in the future or we will demand that people deal with the problems they themselves have created. If we attribute health inequalities to perceptions of stress, we may focus on altering how people view their circumstances rather than changing the circumstances themselves. If we see the organization of society and the distribution of economic and social resources as the main determinants of health, we will see economic and social policies as a means of improving health (Raphael, 2005). How then do Canadians deal with healthcare?

SELF-CARE AND INFORMAL CARE

Most people care for themselves most of the time; **self-care** is the primary form of care even when health declines and we require help from others and the healthcare system. We wash our hands, exercise, choose what to eat, establish any number of lifestyle practices, try to have a positive outlook on life, and when we feel ill, go to bed or take over-the-counter drugs.

Except in emergencies, when we turn to others for help, we generally turn first to family members and friends. This is just as true in old age as when we are young. Indeed, throughout history, family members and friends have been the first resources for care. Despite what you may hear about modern, Western societies such as Canada being individualistic, youth-oriented, and dismissive of older adults, the fact is that we continue to care for older family members in need. In virtually all developed societies, about three-quarters of all care to older adults comes from family members and, to a lesser degree, from friends and neighbours (Cranswick, 2003). Typically, the spouse/partner is the first to provide care when the health of the other spouse/partner fails; typically, the wife/female partner provides care for her husband/male partner.

After the male partner's death, the wife/female partner may enjoy a few more years of good health before she needs assistance. Her children, usually her daughters, provide most of the care before her death. Notice that informal caring comes primarily from women, including wives and daughters. Sons provide mainly financial assistance and advice, while daughters provide mainly emotional support and hands-on care. However, if no daughter is available and a son is close by, then the son usually provides the necessary care (Keating et al., 1999). This is possible because the great majority of older adults live close to at least one child.

Usually, families readily assume responsibility for the care of their older members. Research has put to rest the myth that families in contemporary Western societies abandon older members (Montgomery, Borgatta, and Borgatta, 2000). Despite what we have been hearing for many years about changing family forms, more women working in the paid labour force, fewer children being available to provide help, and greater geographic mobility, there is no indication that families are decreasing their involvement in the care of their older family members.

FORMAL MEDICAL AND HOME CARE

Often, family members cannot provide all the care loved ones need. Sometimes care calls for specialized knowledge, skills, medicine, and equipment that only physicians or other healthcare personnel can provide. Sometimes the sheer amount of time and effort required exceeds the family's capabilities. In such cases, people turn to the formal healthcare system. Canada's publicly funded healthcare system, like the healthcare systems of other wealthy countries (the United States excepted), offers universal access to physician and acute care hospital services for its citizens based on need rather than the ability to pay. In Canada, this system is commonly but unofficially known as Medicare.

Regardless of the resources that the healthcare system makes available, most older adults first turn to family members for care.
SOURCE: © Shutterstock.

A Brief History of Canada's Healthcare System

Before the establishment of Canada's healthcare system, people needing healthcare had to pay for it or do without. This situation was especially problematic for poor people whose health needs were often great—among them a disproportionately large number of older adults, the unemployed, and those with chronic disabilities. Gaps in access to healthcare were particularly apparent in the years following World War I and the Depression of the 1930s. With Tommy Douglas, the leader of the Cooperative Commonwealth Federation (CCF) party and premier of Saskatchewan, leading the way, Canada gradually introduced legislation to address these needs. In 1957, the Hospital Insurance and Diagnostic Services Act led to hospital care coverage for the entire population. In 1966, the Medical Care Act laid the groundwork for universal health insurance for physician services. By 1972, all Canadian provinces and territories had joined the program, with the federal government sharing physician and hospital services costs equally with the provinces and territories.

From the outset, healthcare in Canada was structured as a provincial and territorial responsibility. The federal government develops policy and assists with funding, but each province and territory is responsible for delivering services. Under the Medical Care Act, every province and territory offers publicly funded physician and acute care hospital services. However, this does not mean that we have "socialized medicine." Rather, a third party (the government) pays for most services on our behalf. Most physicians in Canada operate as private entrepreneurs; governments pay them for the services they decide are necessary and that they render. In other words, we publicly finance healthcare but physicians provide it privately, with payment guaranteed by the government. The more services physicians provide, the more they earn. They hold this privileged position because of the importance our society attaches to their expertise, which makes them the gatekeepers to our healthcare system. Only physicians can certify that we are sick, order medical tests and prescription drugs, and admit us to hospital.

Historically, we have defined health as the absence of disease, thereby excluding from coverage preventative measures and other therapies based on a broad, holistic view of health. We do not universally cover many types of healthcare, such as dentistry, home care, nursing homes, physiotherapy, counselling, podiatry, drugs prescribed outside the hospital, chiropractic services, midwifery, and massage therapy. As a result, coverage for such services varies across provinces and territories. Some provide these services as part of their healthcare system at no cost to the user. Others provide them at minimal cost or on a means-tested basis whereby people's finances are assessed. If they can afford a required service, they pay for it. Otherwise, government subsidizes the cost. Access to such services also varies. For example, some jurisdictions require physician referral while others permit self-referral.

Home Care Services in an Aging Society

Although different healthcare services are important to different people at different times, one type of healthcare service that has become especially important in an aging society is home care. It brings services into people's homes, where they prefer to live, rather than requiring them to move to a seniors' residence or a nursing home. It is also much less expensive than nursing home care (Chappell and Hollander, 2011).

Typically, home care includes personal care, nursing, and physiotherapy services. It can also include housekeeping, meal preparation, transportation, and

respite services. Home care is not primarily about providing medical care. Instead, it offers care for social roles or activities that a medical condition may prevent us from providing for ourselves, such as housekeeping, grocery shopping, and seeking the company of others. For many older adults, staying in their own homes requires not only home care but also the presence of an unpaid caregiver. Despite its importance, home care accounts for less than 5 percent of public healthcare expenditures (Conference Board of Canada, 2012). Today, most provinces have moved toward more private, for-profit provision of home care, particularly for nonmedical services.

HEALTHCARE SYSTEM CHANGE AND REFORM

In the years following the establishment of Canada's medical provisions, the cost of healthcare rose steadily. As a result, by the 1980s, the federal government had shifted away from earlier agreements to share the costs of healthcare equally with the provinces and territories to a form of block funding, giving provinces and territories a set amount of money to cover healthcare services. In response, the provinces and territories began experimenting with user fees and extra billing to offset federal funding cuts. In 1984, the federal government passed the Canada Health Act requiring the provinces and territories to maintain universal coverage, reasonable access to services, portability of benefits across provinces and territories, comprehensive services, and nonprofit administration by a public agency. It also banned user fees and extra billing.

However, cost concerns remained. In the late 1980s and 1990s, the provinces, territories, and federal government further restricted healthcare spending and appointed commissions to review the system (e.g., Commission on the Future of Health Care in Canada, 2002). Public debate erupted around the viability of a publicly funded healthcare system and, within government, the discussion broadened from concerns over financing to whether we need a different type of healthcare system. For the first time since the introduction of healthcare legislation, Canadian citizens and governments began to ask whether the right providers were providing the right services to the right people.

Without denying the importance of medical care by physicians, nearly all government reviews reached the same conclusion: We need to shift away from a system that is almost entirely biomedical and concerned only with the treatment and cure of disease, and acknowledge that health is "a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity" (World Health Organization, 1948). This definition implies a broad conception of care that incorporates health promotion, disease prevention, and attention to the social and environmental determinants of health. Deinstitutionalizing health services and providing more care outside hospitals was also recommended as more appropriate and cost-effective.

Major reforms followed. Most provinces regionalized healthcare services, fewer people received acute and extended care, hospital admissions fell, length of hospital stays dropped, and many surgical treatments moved to outpatient settings (Brownell, Roos, and Roos, 2001; Canadian Institute for Health Information, 2007; Carriere, Roos, and Dover, 2000). At the same time, people increased their use of healthcare services not usually considered part of conventional medicine. This included various forms of complementary and alternative medicine (CAM), such as aromatherapy, naturopathic medicine, chiropractic care, acupuncture, yoga and massage therapy (Chappell and Penning, 2009).

Those who were the most likely to use CAM were women, middle-aged adults, people with higher education and income levels, people residing in urban areas, certain ethnic groups, and people with chronic health problems (Esmail, 2007; Metcalfe et al., 2010; Park, 2004). Their reasons for using CAM included dissatisfaction with conventional medicine, a belief in CAM's more holistic philosophy, and a desire for more involvement and control over their health and healthcare (Penning and Votova, 2008).

Despite these shifts, a new vision for a publicly funded healthcare system that is more holistic and incorporates health promotion, disease prevention, CAM, and attention to the social and environmental determinants of health, did not take hold (Lewis et al., 2001). To date, there is little evidence of an expanded focus on health promotion and disease prevention. Nor has attention shifted toward dealing with the social and environmental determinants of health, including poverty and inequality. For the most part, CAM services still receive only limited coverage under Canada's healthcare legislation or other healthcare plans. Increases to home care budgets are being directed mainly to short-term, post-hospital, and nursing care, reinforcing a medical focus, rather than meeting the long-term chronic care needs of older adults (Penning, Brackley, and Allan, 2006). Indeed,

healthcare reform is now narrowing the scope back to medical care. Why?

PRIVATIZATION AND PROFITIZATION

Some healthcare reformers emphasize the need for privatization and profitization. **Privatization** involves a shift in the production of goods and services from the public (government or state) sector to the private sector (Starr, 1988). It includes selling publicly owned or controlled organizations or services to businesses or other nongovernmental entities. **Profitization** involves turning institutions into profit-making organizations. Privatization and profitization expand the money-making opportunities available to big businesses and their owners but render individual citizens, particularly those with low income, less well protected.

Recent changes in Canada's healthcare system, including shortened hospital stays and the decline in long-term home care services, allow increasing profitization (Williams et al., 2001). Citizens, as consumers, are being asked to seek services privately that were once provided by the public sector. Private funding accounts for an increasing share of Canada's healthcare budget, including CAM and home care expenses (Armstrong, Armstrong, and Coburn, 2001). Of particular concern is that the terms of international trade agreements (such as the North American Free Trade Agreement [NAFTA]) can be interpreted as meaning that once the Canadian government allows businesses to enter an area previously in the public sector, returning it to the public sector is permissible only if the government compensates for-profit firms for lost future profits—practically an impossibility (also see Critical Sociology: Free Trade and State Regulation of Prescription Drug Prices: Who Wins and Who Loses?).

Critical Sociology — FREE TRADE AND STATE REGULATION OF PRESCRIPTION DRUG PRICES: WHO WINS AND WHO LOSES?

Pharmaceutical companies, especially those headquartered in the United States, are set to become major winners in the United States–Mexico–Canada Agreement (USMCA). *Free trade is a* policy that does not restrict imports or exports through tariffs, quotas, or other means. In theory, free trade is meant to open markets, encourage competition, and keep prices low. In this way, it is said to benefit manufacturers and consumers. But does it really?

Pharmaceutical companies use free trade agreements to reduce rather than increase competition. How so? The USMCA protects drug companies' patents on brand name drugs for eight years and, on some of the most important and expensive drugs, including insulin, for at least 10 years (Council of Canadians, 2017). This means that patented brand name drugs will not have to compete against less expensive generic drugs for the designated time periods. Generic drugs are identical to brand name drugs except for the brand name. In effect, companies that produce brand name drugs have been given a monopoly over the production of these drugs for an extended period.

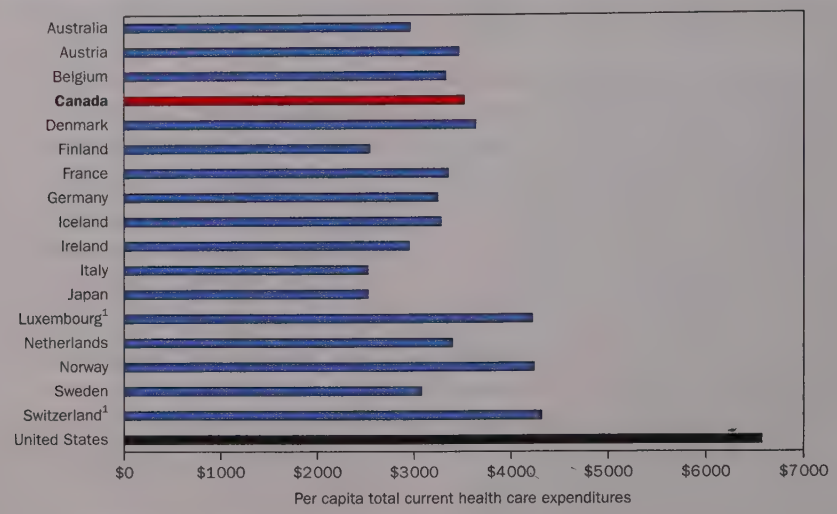
In 2017, six of the ten largest pharmaceutical companies were from the United States. Most pharmaceutical manufacturers in Canada are either subsidiaries of foreign multinationals or generic pharmaceutical manufacturers. So American pharmaceutical companies will be the major beneficiaries of the USMCA.

How does the USMCA affect Canadian consumers, especially older adults and those with chronic illnesses, who rely most heavily on prescription drugs? In general, monopolization is associated with prices increases. Generic drugs are much less expensive than brand name drugs. Canadians already have higher drug costs than Western Europeans do. High costs often mean that people are unable to afford the medications they need. Studies have found that about one in ten Canadians does not take his or her prescription medication as prescribed because of cost, and that up to 35 percent of low-income people without insurance do not fill their prescriptions (Lexchin, 2015).

Critical Thinking Questions

1. According to the World Health Organization, all nations are obliged to ensure equitable access to necessary medicines. To what extent does Canada fulfill this obligation?
2. Canada is considering introducing a national pharmacare program to cover the costs of prescription drugs for Canadians. Past attempts to implement such a program have been unsuccessful, due partly to concerns about potential cost. What are the likely implications of the USMCA for pharmacare in Canada?

FIGURE 14.5 Administrative Costs as a Percentage of Healthcare Spending, Selected Countries



[1]OECD estimate

SOURCE: Based on data from OECD (2011), *Health at a Glance 2011: OECD Indicators*, OECD Publishing, at http://dx.doi.org/10.1787/health_glance-2011-en.

For-profit healthcare tends to be more expensive than universal public programs. For-profit healthcare costs governments less, but people who use the services pay more. Much of the increased cost comes from administrative overhead charges (Marmor and Sullivan, 2000; see Figure 14.5). A for-profit system also leaves many citizens without any health insurance. In the United States, one-sixth of the population lacked health insurance and another one-sixth lacked adequate coverage before President Obama's 2010 healthcare reform (DeNavas-Walt, Proctor, and Smith, 2010). In the period 2010–2014, health insurance coverage broadened, although tens of millions of Americans remained uninsured or underinsured after 2014—most of them poor, illegal immigrants, or both. Canada's healthcare system provides basic care to all people in need, although some research suggests this is not the case for specialist services (Dunlop, Coyte, and McIsaac, 2000). People who earn low income, the older population, and women receive more services because their needs tend to be greater.

The risk is that as more of our healthcare services are profitized, more people with healthcare needs will be disadvantaged. Access to needed care will increasingly vary by class, gender, and racial and ethnic inequalities. With fewer healthcare options available, people lacking economic resources will do without healthcare services or rely only on self-care or care from family and friends (Arber and Ginn, 1991).

For this reason, many sociologists argue that privatization and profitization do not support the type of healthcare system that is appropriate for an aging society—a system that combines medical care and a strong long-term home care program, including social services for older adults. Instead, privatization and profitization are resulting in the dismantling of many existing services, adding new inequalities in access to healthcare services to existing inequalities in healthcare needs. Disadvantaged older adults and their families are feeling most of the resulting pressure. It can be different, but whether Canada's citizens will demand greater equity in healthcare, and whether governments will listen, remains to be seen.

TIME FOR REVIEW

1. How important are self-care, informal or unpaid care from family members and friends, and formal medical and other services for the provision of healthcare in later life?
2. Canada's healthcare system is sometimes referred to as "socialized." How accurate is this view?
3. In recent decades, healthcare in Canada has been subject to widespread debate and reform. What direction has reform taken?

SUMMARY

1. **What is health and how does health vary by age?**
   Health is about physical, social, and psychological well-being, not just the absence of disease. Not all aspects of health status decline as we age. Older adults generally assess their health in positive terms and have good mental health and social well-being.

2. **What are the main sources of variation in health status in Canada?**
   Despite the overall picture of good health in old age in Canada, significant inequalities in health exist. They are associated with such factors as socioeconomic position, gender, Indigenous status, race, and ethnicity. Past increases in health and longevity have been concentrated in more advantaged social groups. Indigenous and immigrant seniors, older women, and the poor continue to experience major health disadvantages.

3. **What are the main causes of health-related inequalities?**
   Health-related inequalities have been attributed to individual health behaviours and lifestyle factors; psychosocial factors such as stress; and material conditions and resources. Research findings suggest that economic circumstances, living conditions, and other material factors contribute much to health-related inequalities, and that health-related lifestyles and stress levels largely reflect these conditions.

4. **What are the main forms of healthcare?**
   We tend to equate healthcare with medical care provided by physicians in clinics or hospitals. However, the most common forms of healthcare are self-care and informal care by family members. When it comes to formal healthcare services, home care is particularly important to the health and well-being of older adults, yet it is not included in Canada's nationally insured healthcare system.

5. **What effects has the recent emphasis on privatization and profit-making in Canada's healthcare system had on health inequality?**
   In recent years, increased emphasis has been placed on privatization and profit-making in Canada's healthcare system, particularly when it comes to services that are most important to older adults. As a result, people who are most in need of care have the least access to it and are the most likely to have to rely on themselves and family members for care.

QUESTIONS TO CONSIDER

1. What are the major myths about old age? How does the reality of old age in Canada compare with these myths?
2. How can we best account for inequalities in health among senior Canadians?
3. How well does Canada's healthcare system currently meet the healthcare needs of its senior population?
4. What are some of the consequences of privatization and profitization for Canada's healthcare system?

GLOSSARY

The **age as leveller hypothesis** (p. 333) holds that aging renders everyone disadvantaged, regardless of their other statuses.

Ageism (p. 324) is stereotyping or discrimination based on age.

The **compression of morbidity hypothesis** (p. 327) holds that, in the future, we will be able to postpone the onset of chronic disability to the point where most people will be able to live relatively healthy lives until shortly before death, when they will experience rapid deterioration.

Functional disability (p. 326) is long-term restriction or lack of ability to perform various activities of daily living (such as personal care and housework) because of a health problem.

The **healthy immigrant effect** (p. 329) refers to the tendency for recent immigrants to enjoy better health than do their Canadian-born counterparts. The effect dissipates over time.

The **hierarchy stress perspective** (p. 331) is an approach to understanding health inequality that emphasizes the stress associated with occupying a lower position in the social hierarchy and its negative impact on health.

The **intersectionality hypothesis** (p. 333) holds that health inequities result from the intersection of different social locations.

The **life course perspective** (p. 333) draws attention to the interplay between individual life course change and larger societal changes.

Life expectancy (p. 322) is the number of years that the average person can expect to live.

Medicalization (p. 324) refers to a process whereby more and more areas of life come under the control of medical professionals.

The **modified extended family** (p. 327) is characterized by mutual and close intergenerational ties, responsible behaviour on the part of adult children, and contact between generations.

The **mortality rate** (p. 324) is the number of deaths per thousand people in a population.

The **multiple jeopardy hypothesis** (p. 333) holds that the effect of occupying multiple low statuses is cumulative.

Privatization (p. 337) involves shifting the production of goods and services from the public (government or state) sector to the private sector.

Profitization (p. 337) involves turning institutions into profit-making organizations.

Self-care (p. 334) is the range of activities that individuals undertake to enhance health, prevent disease, and restore health. Individuals may engage in these activities on their own or in conjunction with health professionals.

CHAPTER 15

POLITICS AND SOCIAL MOVEMENTS

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© AP Photo/Ted S. Warren.

AFTER READING THIS CHAPTER, YOU WILL BE ABLE TO

- Analyze the relationship between the level of democracy in society and the capacity of citizens to influence the state through their support of political parties and social movements.
- Describe the connection between the way power is distributed in society and the success of particular kinds of parties and policies.
- Explain how and why people sometimes riot, strike, and take other forms of collective action to correct perceived injustices.
- Recognize the history of democracy as a struggle for the acquisition of constantly broadening citizenship rights.

INTRODUCTION

I almost caused a small riot once. It happened in Grade 11, shortly after I learned that water combined with sulfur dioxide produces sulfurous acid. The news shocked me. To understand why, you have to know where I lived: in Saint John, New Brunswick, about 100 metres downwind of one of the larger pulp and paper mills in Canada. Acrid waves of sulfur dioxide billowed day and night from the mill's imposing smokestacks. The town's pervasive rotten-egg smell was a longstanding complaint in the area. But, for me, disgust turned to upset when I realized the fumes were toxic. Suddenly it was clear why many people I knew—especially people living near the mill—woke up in the morning with a kind of "smoker's cough." By the simple act of breathing, we were causing the gas to mix with the moisture in our bodies and form an acid that our lungs tried to expunge, with only partial success.

Twenty years later, I read the results of a medical research report showing that residents of that New Brunswick area suffer from rates of lung disease, including emphysema and lung cancer, significantly above the national average. However, even in 1968 it was evident a serious problem was brewing in my hometown. I therefore hatched a plan. Our high school was about to hold its annual model parliament. The event was notoriously boring, partly because, year in, year out, virtually everyone voted for the same party, the Conservatives. But here was an issue, I thought, that could turn things around. The pulp and paper mill was owned by K. C. Irving, an industrialist so powerful that his companies were said to control 40 percent of New Brunswick's economic output. *Forbes* magazine in the United States annually ranked Irving among the wealthiest men in the world. I figured that once I told my schoolmates the political implications of the fact that water combined with sulfur dioxide produces sulfurous acid, they would quickly demand the closure of the mill until Irving guaranteed a clean operation.

Was *I* naive. As head of the tiny Liberal Party, I had to address the entire student body during assembly on election day to outline the party platform and mobilize votes. When I got to the part of my speech explaining why K. C. Irving was our enemy, the murmuring in the audience, which had been growing like the sound of a hungry animal about to

The year 1968 was one of student rebellion worldwide. Here students run from police in Paris, France.

SOURCE: © Bettmann/Getty Images.

pounce on its prey, erupted into loud "boos." A couple of students rushed the stage. The principal suddenly appeared from the wings and commanded the student body to settle down. He then took me by the arm and informed me that, for my own safety, my speech was finished. So, I discovered on election day, was our high school's Liberal Party. And so, it emerged, was my high school political career.

This incident troubled me for many years, less because of the embarrassment it caused me than because of the puzzles it presented. Why did I almost cause a small riot? Why didn't my schoolmates rebel in the way I thought they would? Why did they continue to support an arrangement that was enriching one man at the cost of a community's health? Why weren't they enraged? Couldn't they see the injustice?

Other people did. The year 1968 was not just the year of my political failure at Saint John High School. It was also the year that student riots in France nearly caused the fall of the government of Charles de Gaulle. It was the year in which the suppression of student strikes by the Mexican government left dozens of students dead. It was the year in which American students at Berkeley, Michigan, and other universities fought with unprecedented vigour for free speech on their campuses, an end to American involvement in the war in Vietnam, increased civil rights for American blacks, and an expanded role for women in public affairs.

I didn't know it at the time, but by asking why students in Paris, Mexico City, and Berkeley rebelled while my schoolmates did not, I was raising the main question that animates the sociological study of politics and social movements. Why are some groups more successful than others in formulating their demands and getting them carried out? In other words, who gets what and under what social circumstances? That is the main issue addressed by this chapter.

Power is the ability of an individual or a group to impose its will on others, even if they resist (Weber, 1946 [1922]: 180). In the first section of this chapter, you will learn that the power of a group may be widely recognized as legitimate or valid under some circumstances. If it is, raw power becomes legitimate **authority**. The people who occupy the command posts of institutions are then generally seen as **authorities**. Under other circumstances, however, power flows to nonauthorities. This situation undermines the legitimacy of authority. In this case, nonauthorities form **social movements**, or collective attempts to change part or all of the social order. They may riot, petition, strike, demonstrate, and establish pressure groups, unions, and **political parties** (organizations that seek to control state power) to achieve their aims.

The terms defined above allow us to distinguish between "normal politics" and "politics beyond the rules." Normal politics is politics as it is practised when authorities are firmly in power. Politics beyond the rules is politics as it is practised when the legitimacy of authority grows weak. Sociologists have proposed various theories to explain the two types of politics. In the second and third sections of this chapter, I evaluate these theories using mainly Canadian data.

Finally, in the chapter's concluding section, I place our discussion in historical context. How has politics developed over the past 300 years? What developments can we reasonably expect in the near future? This section will help you to better understand your political options in coming years.

TIME FOR REVIEW

1. What is the difference between power and authority?
2. What is the difference between political parties and social movements?

POWER FROM ABOVE: NORMAL POLITICS

In 2010, government delegates from the world's 20 biggest economies met for a summit in downtown Toronto to discuss the state of the world economy. Protesters gathered to protest growing inequality and poverty, among other issues. At its height, about 20 000 security personnel and 10 000 protesters faced each other. The demonstrations were largely peaceful. However, vandalism causing $750 000 in damage sparked police brutality, the use of sound cannons, and the arrest of more than 900 protesters—the largest mass arrest in Canadian history. During and after the summit, security forces were widely criticized for using excessive force and violating human rights. Some police officers were charged with breaking the law.

Paradoxically, the use of **force** or coercive power by authorities is a sign of their weakness: If authorities are truly in a position of strength, their rule will be widely recognized as legitimate. They will not need to use force to impose their will because most people agree with their policies. Here, politics will be routine, nonviolent, or "normal." To be sure, minor outbursts of violence occur even under normal politics.

Demonstration in Toronto during the G-20 summit, 2010.
SOURCE: © arindambanerjee/Shutterstock.

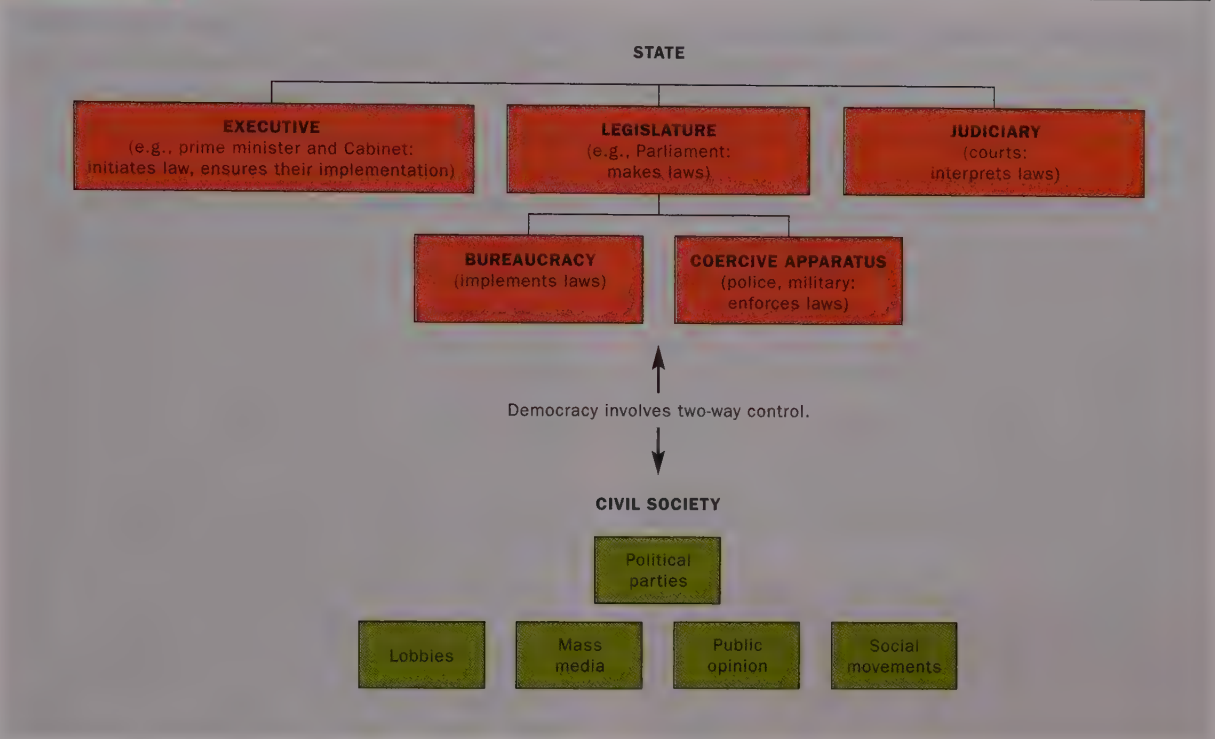
However, such events are unusual in Canada today. They rarely result in fatalities. For the most part, Canadian politics today is normal politics.

Power is exercised in all social settings, from the family to the classroom to the workplace. However, the ultimate seat of power in society is the state. The **state** is a set of institutions that formulate and carry out a country's laws, policies, and binding regulations. Why is the state's power "ultimate?" Because its authority stands above all others, and if the state needs to use force to maintain order or protect its borders, most people will regard its actions as legitimate.

In democratic countries, such as Canada, the government is formed by the elected members of the political party that wins the most seats in a general election (see Figure 15.1). It comprises the head of the party, who becomes prime minister, and the cabinet ministers whom the prime minister selects to advise him or her. It is the job of the government to initiate policies, propose laws, and see that they are enforced. That is why the government is also called the *executive* branch of the state. Proposed laws are turned into operating statutes by the *legislature*, which consists of all the people elected to Parliament. It is the responsibility of the *judiciary* or court system to interpret laws and regulations, that is, to figure out whether and how particular laws and regulations apply in disputed cases. The state's *administrative apparatus* or *bureaucracy* undertakes enforcement of laws. If laws are broken or the state's security is jeopardized, it is the role of the *coercive apparatus*—the police and military—to enforce the law and protect the state.

The state, then, is a set of institutions that exercise control over society. However, individuals in **civil society**, the private sphere of life, also exercise control over the state through a variety of organizations and institutions. We have already noted how social movements may influence the state. In addition, the mass media are supposed to keep a watchful and critical eye on the state and help to keep the public informed about the quality of government. Pressure groups or "lobbies" are formed by trade unions, manufacturers' associations, ethnic groups, and other organizations to advise politicians of their members' desires. Lobbies also remind politicians how much their members' votes and campaign contributions matter. Finally, political parties regularly seek to mobilize voters as they compete for control of government.

FIGURE 15.1 The Institutions of State and Civil Society



How democratic is the Canadian state? Does the interaction between state and civil society ensure that every citizen has a roughly equal say in the determination of laws and policies? Or, as George Orwell asked in *Animal Farm*, are some citizens more equal than others? Do we, as Abraham Lincoln claimed for the Americans, enjoy "government of the people, by the people, for the people?" Or is it more accurate to say, in the words of one wit, that we are subjected to "government of the people, by the lawyers, for the business owners"? These are among the chief questions asked by sociologists who study the state and its operations. It is now time to consider them in detail.

PLURALIST THEORY

Pluralist theory is one interpretation of the relationship between state and civil society (Dahl, 1961; Polsby, 1959). According to pluralists, we live in a heterogeneous society with many competing interests and centres of power. For example, the interests of parents with school-aged children may differ from the interests of pensioners. Parents may want school budgets to grow. Pensioners may want them to shrink. Because of such heterogeneity, no one group can control politics, according to the pluralists. They argue that, over time, all voters and interest groups influence the political process almost equally. Sometimes one category of voters wins a political battle, sometimes another. Most often, however, politics involves negotiation and compromise among competing groups. According to the pluralists, because no one group of people is always able to control the political agenda or the outcome of political conflict, democracy is guaranteed.

ELITE THEORY

Elite theorists, C. Wright Mills (1956) foremost among them, sharply disagree with the pluralist account. According to **elite theory**, *elites* are small groups that occupy the command posts of a society's institutions. In the United States, the country that Mills studied, the most powerful elites are the people who run the country's several hundred biggest corporations, the executive branch of government, and the military. Mills wrote that the people who control these institutions (they are almost all men) make the important decisions that profoundly affect members of society. Moreover, they do so without much regard for elections or public opinion.

Mills showed how the corporate, state, and military elites are interconnected. People move from one elite to another during the course of their careers. Their children intermarry. They maintain close social

contact. They tend to be recruited from the upper-middle and upper classes. However, Mills denied that these similarities and interconnections turn the three elites into a **ruling class**, that is, a self-conscious and cohesive group of people, led by corporate executives and owners of big businesses, who act to advance their common interests. The three elites are independent of each other, Mills insisted. They may see eye to eye on many issues, but each has its own jealously guarded sphere of influence, and conflict between elite groups is therefore common (Mills, 1956: 277).

The Elitist Critique of Pluralism

Most political sociologists today question the pluralist account of democratic politics because research has established the existence of large, persistent, wealth-based inequalities in political influence and political participation.

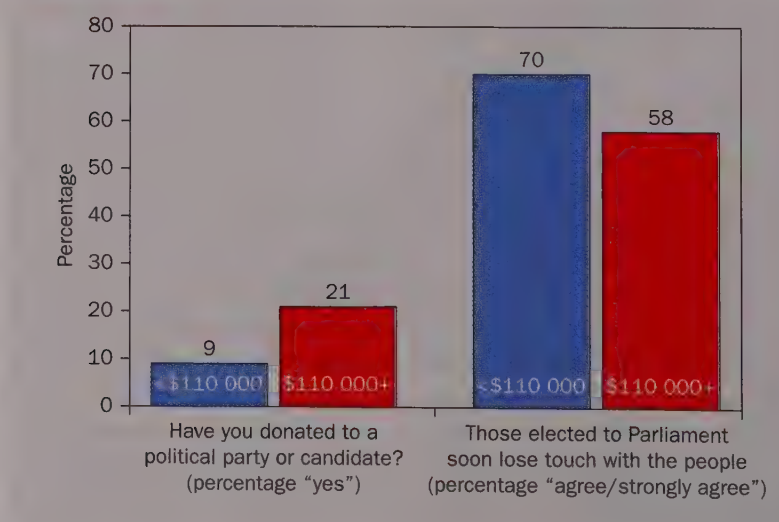
John Porter's classic, *The Vertical Mosaic* (1965), was the first in a series of Canadian studies that demonstrated the weaknesses of pluralism and corroborated aspects of elite theory (Brym, 1989; Clement, 1975; Olsen, 1980). These studies showed that, in the 1970s, a disproportionately large number of people in Canada's political and other elites came from upper- and upper-middle-class families. For example, about 40 percent of Canadian prime ministers, premiers, and Cabinet ministers were born into the richest 10 percent of families in the country (Olsen, 1980: 129). In their youth, members of Canada's elites were likely to have attended expensive private schools. As adults, they tended to marry the offspring of other elite members and belong to exclusive private clubs. During their careers, they often moved from one elite to another. Arguably, people with this sort of background could not act dispassionately on behalf of all Canadians, rich and poor.

These studies generated controversy over whether Canada's elites form a ruling class. Porter (1965), like Mills (1956), noted frequent conflict among elites. He argued against the view that a ruling class controls Canada. His students disagreed. They argued that the interests of large corporations dominate Canadian political life (Clement, 1975; Olsen, 1980). However, both Porter and his students agreed on one point: Contrary to pluralist claims, Canada's well-to-do consistently exercise disproportionate influence over political life in this country.

Studies of political participation in Canada added weight to the elitist view. Many surveys show that political involvement decreases with social class. For example, the likelihood of voting falls with a person's class position. The likelihood of phoning or writing a member of Parliament, helping a candidate in an election campaign, and running for office declines even more steeply as we move down the socioeconomic hierarchy (Fournier et al., 2015).

In addition, well-to-do Canadians contribute more money to political parties than other Canadians do (see Figure 15.2). Private contributions are

FIGURE 15.2 Political Cynicism and Donations to Political Parties by Annual Household Income, Canada, 2015



SOURCE: Adapted from Patrick Fournier et al. (2015). From the 2015 *Canadian Election Study* [dataset] at https://ces-eec.arts.ubc.ca/english-section/surveys (retrieved 9 November 2018).

especially beneficial to the Conservative Party, which receives more money in the form of private contributions than do all other political parties combined (Jansen, Thomas, and Young, 2012).

As intensity of political participation declines, so does political influence. Consequently, although political apathy and cynicism are high among Canadians, the poorest Canadians are the most politically apathetic and cynical of any income category. They have less interest in politics than do the well-to-do, and they are more likely to think that governments elected to Parliament soon lose touch with the people (see Figure 15.2). As a leading political sociologist wrote, "The combination of a low vote and a relative lack of organization among the lower-status groups means that they will suffer from neglect by the politicians who will be receptive to the wishes of the more privileged, participating, and organized strata" (Lipset, 1981: 226–27).

The Marxist Critique of Elite Theory

Although compelling in some respects, elite theory has its critics. Some Marxists, known as "instrumentalists," deny that elites enjoy more or less equal power. Actually, they say, elites form a ruling class dominated by big business. From their point of view, the state is an arm (or "instrument") of the business elite. Big business gains control of the state in three main ways. First, members of wealthy families occupy important state positions in highly disproportionate numbers. Second, government officials rely mainly on the representatives of big business for advice. Third, political parties rely mainly on big business for financial support. According to some Marxists, members of different elites may disagree about specific issues. However, as a result of the three control mechanisms listed above, they always agree about one issue: the need to maintain the health of the capitalist system (Miliband, 1973 [1969]).

A second group of Marxists, known as "stucturalists" offers a somewhat different interpretation of why the state in capitalist society is necessarily biased in favour of big business. For the structuralists, it is not so much the social origins of high government officials or the social ties linking them with big business that encourages the state to act with a pro-capitalist bias. Rather, they argue, the capitalist state acts as an arm of big business because it is constrained to do so by the nature of the capitalist system itself. For example, if the Canadian government doubled the corporate tax rate, investment would be redirected to countries with regimes that are kinder to company profits. Such a move would cost Canada jobs and prosperity. It would be highly unpopular. The government could easily fall. Fearing such outcomes, governments in capitalist societies find their field of action restricted to policies that ensure the well-being of big business. According to the structuralists, it is the very fact that the state is embedded in a capitalist system that forces it to act in this way (Poulantzas, 1975 [1968]).

It follows from both the instrumentalist and the structuralist positions that ordinary citizens, and especially members of the working class, rarely have much influence over state policy. According to Marxists, true democracy can emerge only if members of the working class and their supporters overthrow capitalism and establish a socialist system in which economic differences between people are eliminated or at least substantially reduced.

Karl Marx predicted that capitalism would create a large mass of impoverished workers who would eventually take over the state, eliminate private property, and forge a communist society. After the revolution of 1917, the Soviet Union became the first self-proclaimed communist society. This early May Day poster reads: "Workers of all countries unite. The 1st of May work holiday. Long live the international unity of the proletariat!"

SOURCE: © Library of Congress/Corbis/VCG via Getty Images.

POWER-BALANCE THEORY

Pluralists assume that all major groups in society enjoy approximately equal power. Elitists assume that members of the upper class enjoy the most power. Both approaches, however, assume that the distribution of power in society does not change much over time, except in those rare instances when revolutions take place.

In contrast, power-balance theorists argue that the distribution of power in society changes significantly more frequently. **Power-balance theory** allows that power is usually concentrated in the hands of the wealthy. However, adherents of this approach also note that other classes sometimes gain power. This has big implications for political life. Among other things, the distribution of power determines how democratic a society is.

To make their case, power-balance theorists first measure variations in the social distribution of power. They then show how those variations are reflected in the successes and failures of different political parties and the rejection and adoption of different state policies. Along with the pluralists, they recognize that society is truly democratic only when power is widely distributed. Along with the elitists, they recognize that society is not very democratic when power is highly concentrated in the hands of a few wealthy citizens. However, by treating the distribution of power as a variable, they improve our understanding of the relationship between power and democracy.

We can better understand power-balance theory by examining Canadian politics in comparative perspective. We first note that a group's power is partly determined by the degree to which it forms organizations to further its interests. For example, unionized blue-collar and white-collar workers are more powerful than their nonunionized counterparts are. That is because unions allow workers to speak with one voice. They enable workers to bargain effectively with employers and governments for improved wages, working conditions, and social policies. Moreover, if bargaining fails, they can go out on strike to try to force the issue.

If level of unionization increases working-class power, that should be reflected in the political behaviour of citizens and the policies adopted by governments. And, in fact, it is. Compare Sweden and Canada (Casper, McLanahan, and Garfinkle, 1994; Korpi, 1983; Myles, 1989; O'Connor, 1996; O'Connor and

The peak year of strike activity in Canada was 1919. In that year, 17.3 strikes took place for every 100 000 non-agricultural workers in the country. This photo was taken on "Bloody Saturday," June 21, 1919, during the Winnipeg General Strike. It shows a violent confrontation between rioters and Mounties and special police.

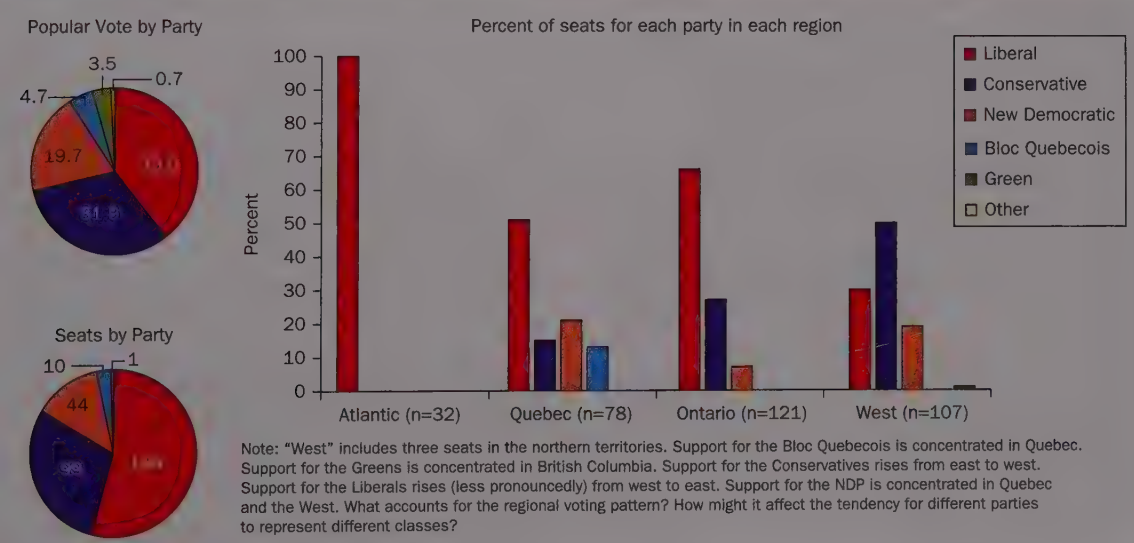
SOURCE: LAC C-33392.

Brym, 1988; O'Connor and Olsen, 1998; Olsen, 2002; Olsen and Brym, 1996). In Sweden, more than three-quarters of blue-and white-collar workers are union members. In Canada, about three in ten non-agricultural workers are members of unions. Several consequences follow:

- About 68 percent of Canadians voted in the 2015 federal election, compared with 87 percent of Swedes in the 2018 Swedish federal election (*CBC News*, 2015; *Wikipedia*, 2018). The difference is largely due to the fact that working-class Swedes are more likely to vote than working-class Canadians are.
- The Swedish socialist party has formed the government almost continuously since World War II. In contrast, Canada's socialist party, the NDP, has never formed the federal government or even had a representative in the federal Cabinet. The parties that have formed Canada's federal governments (Liberals and Conservatives) are those that are most strongly supported by business.
- Swedish governments have acted more vigorously than Canadian governments have to eradicate poverty and equalize incomes. Fewer than 4 percent of Swedes are classified as living below the poverty line (as defined by the low income cut-off; see Chapter 7, Social Stratification). The comparable figure for Canadians is about 9 percent. In Sweden, about 20 percent of all income goes to the top 10 percent of income earners. The comparable figure for Canada is about 30 percent. And in Sweden, a broader range of retired people receive more generous pensions and more frequent cost-of-living adjustments than do pensioners in Canada.
- Since women are disproportionately concentrated in low-income, low-status jobs (see Chapter 5, Genders and Sexualities), they benefit more than men do when the working class is more powerful. As a result, the ratio of women's to men's earnings is about 80 percent in Sweden and 67 percent in Canada. (These figures are based on full-time and part-time workers.) Moreover, in Sweden, the ratio of women to men who live below the poverty line is just above 90 percent, while in Canada the comparable figure is nearly 130 percent. Finally, parental benefits are superior in Sweden and child-care facilities are more widely available and affordable.

So we can see that elections matter a great deal in the lives of ordinary people. Elections determine the types of parties that are elected. Elected parties, in turn, shape government policies. The outcome of any particular election depends on the appeal of party leaders, their effectiveness in presenting issues to the public, and myriad other short-term factors (see Figure 15.3). However, when considering the types of parties that get elected over several decades, as we

FIGURE 15.3 Results of 2015 Canadian Federal Election



Note: "West" includes three seats in the northern territories. Support for the Bloc Quebecois is concentrated in Quebec. Support for the Greens is concentrated in British Columbia. Support for the Conservatives rises from east to west. Support for the Liberals rises (less pronouncedly) from west to east. Support for the NDP is concentrated in Quebec and the West. What accounts for the regional voting pattern? How might it affect the tendency for different parties to represent different classes?

SOURCE: Compiled from *CBC News* (2015); *Toronto Star* (2015).

did previously, we see that the distribution of power between classes and other groups shapes the character of politics in a country.

The preceding analysis also implies that Sweden is more democratic than Canada is. True, citizens of both countries are legally free to vote and influence their governments. But because the working class is more powerful in Sweden, Swedes' legal right to vote and influence governments has been turned into real political influence on a wider scale. In general, only if more citizens wield more clout can society become more democratic.

STATE-CENTRED THEORY

Power-balance theory suggests that democratic politics is a contest among various classes and other groups to control the state for their own advantage. When power is substantially redistributed—when, for example, a major class gets better organized while another major class becomes less socially organized—old ruling parties usually fall and new ones take office.

Note, however, that a winner-take-all strategy would be nothing short of foolish. If winning parties monopolized the spoils of office, passing laws that benefited only their supporters, they might cause massive outrage and even violent opposition. Yet allowing opponents to become angry, organized, and resolute would be counterproductive. After all, winners want more than just a moment of glory. They want to be able to enjoy the spoils of office in a stable political environment over the long haul. To achieve such stability, it is crucial that people who *lose* elections are given a say in government. To a degree, the party in power must attend to the wants of losing minorities. That way, even determined opponents are likely to recognize the legitimacy of the government and its right to rule. Pluralists thus make a good point when they say that democratic politics is about accommodation and compromise; they only lose sight of the fact that accommodation and compromise typically give more advantages to some than to others, as both elite theorists and power-balance theorists stress.

There is, however, more to the story of politics than conflict between classes and between other groups. Theda Skocpol and other **state-centred theorists** have shown how the state itself can structure political life independently of the way power is distributed among classes and other groups at a given time (Block, 1979; Evans, Rueschemeyer, and Skocpol, 1985; Skocpol, 1979). Their argument is a valuable supplement to power-balance theory.

To illustrate how state structures shape politics, consider the problem of nonvoting in the United States. In presidential elections, voter turnout fell more or less steadily between the end of World War II and 1996, when it stood at just 48 percent of the voting age population. Turnout increased to 58 percent by 2016, but the United States still has one of the lowest voter turnouts of any rich democracy in the world (Piven and Cloward, 1989: 5). How can we explain this fact?

The high rate of nonvoting is largely a product of voter registration law—a feature of the American political structure, not of the current distribution of power. In every democracy, laws specify voter registration procedures. In some countries, such as France, citizens are registered to vote automatically once they receive state-issued identity cards at the age of 18. In other countries, such as Canada, a database of citizens who are eligible to vote was first created by state-employed canvassers who went door to door to register voters. The database is updated between elections with information supplied mainly by provincial, territorial, and federal data sources. Only in the United States do individual citizens have to take the initiative to go out and register themselves in voter registration centres. In some states, they must present state-issued ID (a driver's licence or a passport) to register. Yet many American citizens are unable or unwilling to register. As a result, the United States has a proportionately smaller pool of eligible voters than the other democracies do. Only about 65 percent of American citizens are registered to vote (Piven and Cloward, 1989: 256–59).

Apart from shrinking the pool of eligible voters, American voter registration law has a second important consequence. Because some *types* of people are less able and inclined than others to register, a strong bias is introduced into the political system. Specifically, the poor are less likely to register than the better-off are. People without much formal education are less likely to register than the better-educated are. Members of disadvantaged racial minority groups, especially African Americans, are less likely to register than whites are. Such people are less likely than others are to have the knowledge, time, and money needed to register, let alone a driver's licence or a passport. So American voter registration law is a pathway to democracy for some but a barrier to democracy for others. The American political

system is less responsive than other rich democracies are to the needs of the disadvantaged. That is partly because, as state-centred theory suggests, the law requires citizen-initiated voter registration. As a result, many disadvantaged people are effectively disenfranchised.[1]

Big shocks sometimes rock state structures. In general, however, they are resistant to change. The foundations of state structures are anchored by constitutions, which can be altered only by large majorities of federally elected representatives and state or provincial legislatures. Their upper storeys are girded by laws, regulations, and policies, some of which help to keep potentially disruptive social forces at bay. American voter registration law is a case in point.[2] And then there are the many ideological reinforcements. All states create anthems, flags, ceremonies, celebrations, sporting events, and school curricula that stimulate patriotism and serve in part to justify existing political arrangements.

In sum, each school of thought reviewed above makes a useful contribution to our appreciation of normal democratic politics (see Table 15.1). Pluralists teach us that normal democratic politics is about compromise and the accommodation of all group interests. Elite theorists teach us that, despite compromise and accommodation, power is concentrated in the hands of higher-status groups, whose interests the political system therefore serves best. Power-balance theorists teach us that, despite the concentration of power in society, substantial shifts in the distribution of power often occur, and they have discernible effects on voting patterns and public policies. Marxists highlight the rare occasions when political power is rapidly redistributed by revolutionary upheavals. And state-centred theorists teach us that, despite the influence of the distribution of power on political life, state structures also exert an important independent effect on politics.

TIME FOR REVIEW

1. Describe the functions of the institutions comprising the state and the relationship of those institutions to civil society.
2. Outline the strengths and weaknesses of pluralist theory, elite theory, Marxist theory, power-balance theory, and state-centred theory.

POWER FROM BELOW: POLITICS BEYOND THE RULES

RELATIVE-DEPRIVATION THEORY

All five theories of democracy reviewed above focus on normal politics. However, we know that politics is sometimes anything but normal. Routine political processes can break down. Social movements can

TABLE 15.1 Five Sociological Theories of Democracy Compared

	PLURALIST	ELITE	MARXIST	POWER BALANCE	STATE-CENTRED
How is power distributed?	dispersed	concentrated	concentrated	concentrated	concentrated
Who are the main power holders?	various groups	elites	ruling class	upper class	state officials
On what is their power based?	holding political office	controlling major institutions	owning substantial capital	owning substantial capital	holding political office
What is the main basis of public policy?	the will of all citizens	the interests of major elites	capitalist interests	the balance of power between classes, etc.	the influence of state structures
Do lower classes have much influence on politics?	yes	no	rarely	sometimes	sometimes

form. Large-scale political violence can erupt. As Vladimir Lenin, the leader of the Russian revolution of 1917, said, people sometimes "vote with their feet." In Canada, some evidence suggests that normal politics is increasingly unpopular, especially among younger people, while participating in demonstrations is an increasingly popular form of political expression. So, in 2011–12, a series of social movements attracting a disproportionate number of young people erupted on the Canadian scene. They included the Idle No More movement (in support of Indigenous rights), the Occupy Wall Street movement (in support of greater economic equality), and the Maple Spring movement in Quebec (in support of free tuition and related issues). Meanwhile, in the 2015 federal election, voter turnout was nearly 22 percentage points lower among Canadians between the ages of 18 and 24 than among Canadians between the ages of 65 and 74 (Elections Canada, 2016).

Until about 1970, many sociologists argued that social movements tend to emerge when people experience **relative deprivation**. People feel relatively deprived when they experience an intolerable gap between the social rewards they think they deserve and the social rewards they expect to receive. (Social rewards are widely valued goods, including money, education, security, prestige, and so on.) Accordingly, people are most likely to rebel against authority when rising expectations (brought on by, say, rapid economic growth and migration) are met by a sudden decline in social rewards (perhaps because of economic recession or war; Davies, 1969). In addition, until about 1970, many sociologists held that the people who lead and first join social movements are likely to be outsiders who lack strong social ties to their communities.

A large body of research has now discredited these ideas. For example, we now know that the leaders and early joiners of social movements are usually well-integrated members of their communities, not socially marginal newcomers. In the 1930s, for example, Saskatchewan farmers and workers formed the Cooperative Commonwealth Federation (CCF) to protest federal government policy toward the West in general and Western agriculture in particular. The movement's leaders and early recruits were not outsiders. The workers were mainly local trade union activists. The farmers had been involved in the establishment of community-owned retail stores, credit unions, and marketing cooperatives (Lipset, 1971).

Much research also calls into question the idea that relative deprivation leads to the formation of social movements. For example, sociologists have compared measures of relative deprivation with the frequency of demonstrations, strikes, and acts of collective violence in France, Italy, Germany, and England. They have found that, in general, outbreaks of collective unrest do not increase with mounting relative deprivation (Tilly, Tilly, and Tilly, 1975).

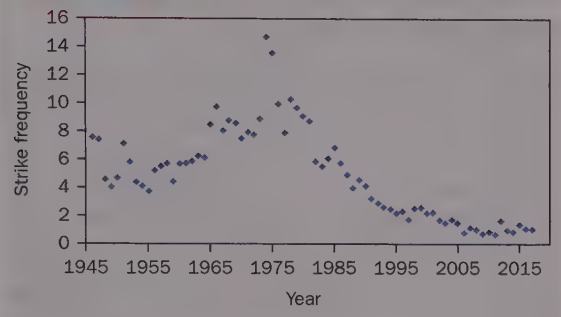
RESOURCE MOBILIZATION THEORY

Because of the inadequacies of relative deprivation theory noted above, an alternative approach to the study of social movements gained popularity. **Resource mobilization theory** is based on the idea that social movements emerge only when disadvantaged people can marshall the means necessary to challenge authority (Jenkins, 1983; McCarthy and Zald, 1977; Oberschall, 1973; Tilly, 1978). Foremost among the resources they need to challenge authority is the capacity to forge strong social ties among themselves. Other important resources that allow disadvantaged people to challenge authority include jobs, money, arms, and access to means of spreading their ideas.

You can appreciate the significance of resource mobilization theory by considering patterns of strike activity in Canada. When blue-collar and white-collar workers go out on strike, they are withholding their labour to extract concessions from employers or governments in the form of higher wages and improved social welfare benefits. When are workers most inclined to challenge the authority of employers and governments in this way? Research shows that in Canada since World War II, strike activity has been high when (1) unemployment is low, (2) union membership is high, and (3) governments have been relatively generous in their provision of social welfare benefits.

Low unemployment indicates a strong economy. Workers are inclined to strike when business activity is robust because they know employers and governments can afford to make concessions. (Employers make bigger profits and governments collect more taxes during economic booms.) A high level of unionization is also conducive to more strike activity because unions provide workers with leadership, strike funds, and coordination. So, as resource mobilization theory predicts, strong social ties among workers (as indicated by a high level of unionization)

FIGURE 15.4 Frequency of Strikes, Canada, 1946–2017



Note: "Strike frequency" is the number of strikes per 100 000 non-agricultural workers.

SOURCES: Brym, Birdsell Bauer, and McIvor (2013); Government of Canada (2018).

and access to jobs and money (as indicated by a booming economy) increase challenges to authority (as indicated by strikes).[3]

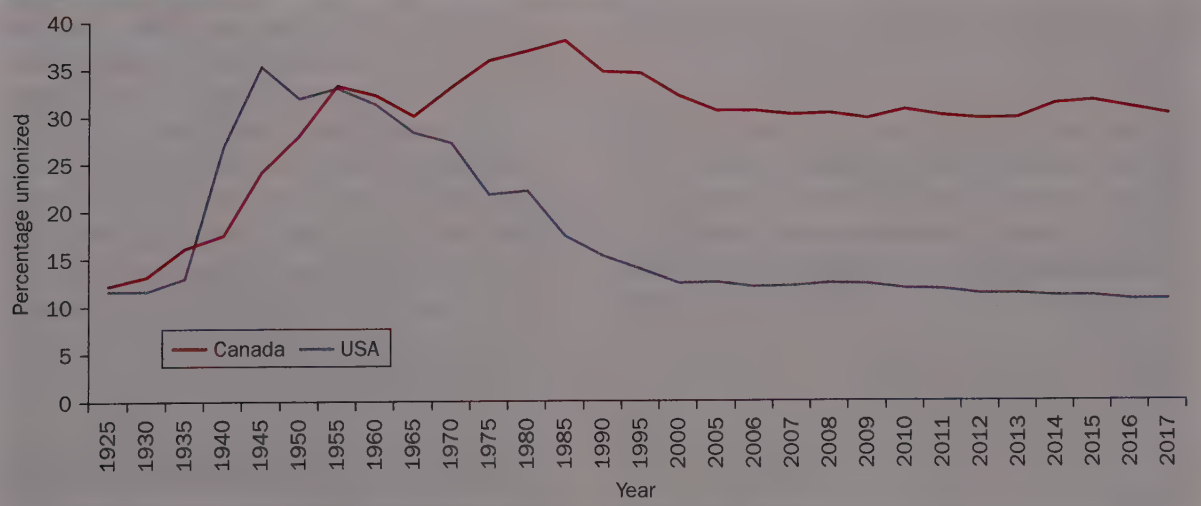
Figure 15.4 shows the pattern of strike activity in post-World War II Canada. It supports the arguments of resource mobilization theory. Until 1974, the trend in strike activity was upward. (In the 1970s, Canada was, in fact, one of the most strike-prone countries in the world.) This was a period of growing prosperity, low unemployment, expanding state benefits, and increasing unionization. With increasing access to organizational and material resources, workers often challenged authority in the three decades after World War II. In 1973, however, economic crisis struck. Due to war in the Middle East, oil prices tripled and then tripled again at the end of the decade. Inflation increased and unemployment rose. Soon, the government was strapped for funds and had to borrow heavily to maintain social welfare programs. Eventually, the debt burden was so heavy that the government felt obliged to cut various social welfare programs.

Unionization reached a peak in 1978, stabilized, and then began to fall (see Figure 15.5). So, in the post-1973 economic climate, the organizational and material resources of workers fell. As a result, strike activity plummeted. In 1974, about 15 strikes took place for every 100 000 Canadian workers. By 2017, that figure had fallen to about 1 (Brym, 2008; Brym, Birdsell Bauer, and McIvor, 2013).

FRAMING DISCONTENT

As you have seen, resource mobilization theory is a useful approach to the study of social movements, such as the strike movement in Canada. Even so, the emergence of a social movement sometimes takes sociologists by surprise. In addition, the failure of an aggrieved group to press its claim is sometimes equally unexpected. And movements that emerge are successful to varying degrees. It seems, therefore, that something lies between (1) the capacity of disadvantaged people to mobilize resources for collective

FIGURE 15.5 Percentage of Non-Agricultural Workers Unionized, Canada and the United States, 1925–2017



SOURCES: Bureau of Labor Statistics (2012, 2014, 2018); Canada Department of Labour (1973); Employment and Social Development Canada (2017); Government of Canada, Labour Program (2014); Human Resources Development Canada (1995, 1998); Human Resources and Skills Development Canada (2011); Mayer (2004); Statistics Canada (2008).

action and (2) the recruitment of a substantial number of movement members. Sociologists call that "something" **frame alignment** (Goffman, 1974; Snow et al., 1986). Frame alignment is the process by which individual interests, beliefs, and values either become congruent and complementary with the activities, ideas, and goals of the movement or fail to do so. Thanks to the efforts of scholars operating mainly in the symbolic interactionist tradition (see Chapter 1, Introducing Sociology), frame alignment has recently become the subject of sustained sociological investigation.

Frame alignment can be encouraged in several ways. Social movement leaders can reach out to other organizations that, they believe, include people who may be sympathetic to the social movement's cause. For example, an anti-nuclear movement may use the mass media, telephone campaigns, and direct mail to appeal to feminist, anti-racist, and environmental organizations on the assumption they are likely to have members who would agree at least in general terms with the anti-nuclear platform.

In addition, social movements can emphasize attractive values that have so far not featured prominently in the thinking of potential recruits. Social movements can also elevate the importance of positive beliefs about the movement and what it stands for. For example, in trying to win new recruits, movement members might emphasize the seriousness of the social movement's purpose. They might analyze in a clear and compelling manner the causes of the problem the movement is trying to solve. Or they might stress the likelihood of the movement's success. By doing so they might increase the movement's appeal to potential recruits and win them over to the cause.

Social movements can also stretch their objectives and activities to win recruits who are not initially sympathetic to the movement's original aims. This may involve watering down the movement's ideals. Alternatively, movement leaders may decide to take action calculated to appeal to nonsympathizers on grounds that have little or nothing to do with the movement's purpose. When rock, punk, or reggae bands play at nuclear disarmament rallies or gay liberation festivals, it is not necessarily because the music is relevant to the movement's goals. Nor do bands play just because movement members want to be entertained. The purpose is also to attract nonmembers. Once attracted by the music, nonmembers may make friends and acquaintances in the movement and then be encouraged to attend a more serious-minded meeting.

BACK TO 1968

Frame alignment theory stresses the strategies employed by movement members to recruit nonmembers who are like-minded, apathetic, or even initially opposed to the movement's goals. Resource mobilization theory focuses on the broad social-structural conditions that facilitate the emergence of social movements. One theory usefully supplements the other.

The two theories certainly help clarify the 1968 high-school incident I described at the beginning of this chapter. It now seems clear that two main factors prevented me from influencing my classmates in New Brunswick when I spoke to them about the dangers of industrial pollution:

1. Disadvantaged people in New Brunswick were relatively powerless. They had access to few resources they could mobilize on their own behalf. That is because New Brunswick's economy was underdeveloped. Both per capita income and the level of unionization were among the lowest in the country. The unemployment rate was among the highest. In contrast, K. C. Irving, who owned the pulp and paper mill against which I railed, was so powerful that most New Brunswickers could not even conceive of the need to rebel against the conditions of life that he helped to create for them. He owned most of the industrial establishments in the province—the oil refinery and a network of gas stations, the dry docks, the pulp mills, the mines, and the logging operations. Every daily newspaper, most of the weeklies, all of the TV stations, and most of the radio stations were his, too. Little wonder we rarely heard a critical word about his operations. Many people also believed that Irving could make or break provincial governments single-handedly. Should I therefore have been surprised that mere high-school students refused to take him on? In their conservatism, my schoolmates were only mimicking their parents, who, on the whole, were as powerless as Irving was mighty (Brym, 1979).
2. Many of my classmates did not share my sense of injustice. Most of them regarded K. C. Irving as the great provider. They thought his pulp and paper mill, as well as his myriad other industrial establishments, gave many New Brunswickers jobs. They

regarded that fact as more important for their lives and the lives of their families than the pollution problem I raised. Frame-alignment theory suggests I needed to figure out ways of building bridges between their understanding and mine. I did not. I therefore received an unsympathetic hearing.

TIME FOR REVIEW

1. Analyze the strengths and weaknesses of relative deprivation theory, resource mobilization theory, and framing theory.

THE HISTORY AND FUTURE OF SOCIAL MOVEMENTS

I. THE RICH COUNTRIES

Three hundred years ago, social movements were typically small, localized, and violent. In Europe, poor residents of a city might riot against public officials in reaction to a rise in bread prices or taxes. Peasants on an estate might burn their landowner's barns (or their landowner) in response to his demand for a larger share of the crop.

Then the reach of the state grew, soon encompassing most aspects of life. The state taxed nearly all its citizens at higher and higher rates as armies grew and government services expanded. It imposed a uniform language and a common curriculum in a compulsory education system. It drafted most young men for army service. It instilled in its citizens all the ideological trappings of modern nationalism, from anthems to flags to historical myths. And in the process, social movements changed. They became national in scope, typically directing themselves against central governments rather than local targets. They grew in size, partly because potential recruits were now literate and could communicate using the printed word, partly because big new social settings—factories, offices, densely populated urban neighbourhoods—could serve as recruitment bases. And, in most cases, social movements became less violent. Their size and organization often allowed them to stabilize, bureaucratize, and become sufficiently powerful to get their way without frequent resort to extreme measures (Tilly, 1978, 1979a, 1979b).

Social movements often used their power to expand the rights of citizens. We can identify four stages in this process. In Britain, for example, rich property owners struggled against the king in the eighteenth century for **civil citizenship:** the right to free speech, freedom of religion, and justice before the law. The male middle class and the more prosperous strata of the working class struggled against rich property owners in the nineteenth century for **political citizenship:** the right to vote and run for office. In early twentieth-century Britain, women and poorer workers succeeded in achieving these same rights despite the opposition of well-to-do men in particular. During the remainder of the century, blue- and white-collar workers struggled against the well-to-do for **social citizenship:** the right to a certain level of economic security and full participation in the social life of the country by means of the creation of the modern welfare state (Marshall, 1965).

In the last third of the twentieth century, the struggle to broaden citizenship rights entered a new phase, which we now examine in greater detail. The broadening of the struggle for citizenship rights was signalled by the emergence of so-called **new social movements** in the 1960s and 1970s (Melucci, 1980, 1995). What is new about new social movements is the breadth of their goals, the kinds of people they attract, and their potential for going global. Let us consider each of these issues in turn.

Goals

Some new social movements, such as the peace movement, the environmental movement, and the human rights movement, promote the rights not of specific groups but of all humanity to peace, security, and a clean environment.

Other new social movements, such as the women's movement and the gay rights movement, promote the rights of groups that have been excluded from full social participation. Accordingly, gay rights groups have fought for laws that eliminate all forms of discrimination based on sexual orientation. They have also fought for the repeal of laws that discriminate based on sexual orientation, such as anti-sodomy laws and laws that negatively affect parental custody of children. Since the 1960s, the women's movement has succeeded in getting admission practices altered in professional schools, winning more freedom of reproductive choice for women, and opening up opportunities for women in the political, religious, military, educational, medical, and business systems (see Critical Sociology: The Women's Movement and Electoral Politics).

The emergence of the peace, environmental, human rights, gay rights, and women's movements marked the beginning of a fourth stage in the history

Critical Sociology THE WOMEN'S MOVEMENT AND ELECTORAL POLITICS

The women's movement was the first new social movement.

At the beginning of the twentieth century, women began to play a smaller role in domestic and farm work and started to enter the paid labour force in significant numbers. Owning more of their own economic resources, they became more independent-minded. They began to realize they might free themselves of oppressive authority in the home. They also started to understand there was nothing inevitable about their receiving less pay and working in worse conditions than men with comparable jobs did (Strong-Boag, 1986: 179).

Formulating a program for social change requires such resources as time, money, and education. Not surprisingly, therefore, the "first wave" of the women's movement comprised highly educated professionals. A group of women with just that social profile established the Toronto Women's Suffrage Association in Toronto in 1883. By demonstrating, petitioning, and gaining the support of influential liberal-minded men, women won the right to vote federally in 1918, in all provinces and territories except Quebec and the Northwest Territories by 1925, in Quebec in 1940, and in the Northwest Territories in 1951.

Along with the right to vote, women won the right to run for public office. They immediately exercised that right, running mainly on the CCF and Liberal tickets. A woman was first elected to provincial office in Alberta in 1917 and to the federal Parliament in 1921.

In provincial and territorial legislatures and the federal Parliament, women sought institutional reform through government action. Specifically, they pursued equitable pay for women, easier access to higher education, protection from domestic violence, and a fair share of family assets and child support in case of divorce or desertion. However, progress was slow on all these fronts. That was partly because women's representation in the country's legislatures remained meagre. In 2019, women composed just 27 percent of federal MPs (Bashevkin, 1986; "Women in National Parliaments," 2019). Moreover, some female MPs were not advocates of women's rights.

Involvement in electoral politics requires time and money. Women are disadvantaged in this regard. On average, they have lower socioeconomic status than men do, and they are saddled with more domestic responsibilities. These factors prevent many women from running for office.

Public policy analysts note that female political participation can increase if such barriers are removed (Boyd, 2011: 175–76; Brodie, 1991). For example, laws could be passed that would allow candidates to take unpaid leave from their jobs to contest nominations and elections, set spending limits for nomination and election campaigns, make contributions for nomination campaigns tax-deductible, treat child-care and housekeeping costs as reimbursable campaign expenses, and so on. Additionally, laws could be enacted that make government subsidies to political party campaigns dependent on the proportion of their elected candidates who are women. In such a system, party subsidies would increase with the proportion of women elected.

Despite the existence of viable ideas for increasing women's participation in electoral politics, progress has been slow. Therefore, many feminists have developed a strategy that is oriented less toward established political institutions and more toward grassroots action. The new strategy seeks to achieve change not just "from above," by means of party politics, but also "from below," by creating a whole network of new organizations, such as study groups, consciousness-raising circles, women's bookstores, rape crisis centres, abortion clinics, shelters for battered women, and opportunities to publicize the importance of feminist aims, such as International Women's Day marches.

It was not only slow progress on the established political front that led women to create this network of new organizations. Many "second-wave" feminists were deeply involved in the student movement of the 1960s and 1970s. They were appalled to discover that, despite much rhetoric about liberation and equality, men controlled the student movement and often refused to allow feminist issues to become part of their agenda. To pursue their aims, they felt it was necessary to create new organizations run by women.

Today, the women's movement operates both at the grassroots level and within established political organizations to achieve its aims. It is internally differentiated. *Liberal feminists* believe that women can participate fully in society if they achieve equality of opportunity with men. They therefore advocate policies aimed at pay equity and the elimination of gender discrimination in the workplace. *Radical feminists* hold that male domination is rooted in the family. They champion free and safe contraception and abortion, an equitable division of domestic labour, and the like. *Socialist feminists* maintain that legal equality is not enough to ensure that women can participate fully in society. In addition, they argue, the state should

(*continued*)

(continued)

provide affordable and accessible daycare facilities and other services. These services, they say, could alleviate the economic burdens that prevent most women, especially those from the working class, from taking full advantage of available opportunities for education and employment. *Anti-racist and postmodernist feminists* have criticized liberal, socialist, and radical feminists for generalizing from the experience of white women and failing to see how women's lives are rooted in unique historical and racial experiences. These new currents have done much to extend the relevance of feminism to previously marginalized groups. Thus, despite their different emphases, the various types of feminism share a strong desire to see members of a previously marginal group expand their citizenship rights and become full participants in society.

Critical Thinking Questions

1. Canada is in many respects a socially and economically advanced country. However, when it comes to women's representation in Parliament, we lag badly. Just 27 percent of Canada's parliamentarians are women, placing us in 61st place out of 193 countries as of September 1, 2019. The United States is in 76th place at nearly 24 percent women. In three countries (Rwanda, Bolivia, and Cuba), more than one-half of parliamentarians are women (Inter-Parliamentary Union, 2019). Clearly, a country's prosperity is not decisive in determining women's representation in Parliament. What factors are decisive?
2. Does the percentage of female parliamentarians matter? If so, how? If not, why not?

of social movements. This fourth stage involves the promotion of **universal citizenship**, or the extension of citizenship rights to all adult members of society and to society as a whole (Roche, 1995; Turner, 1986: 85–105).

Membership

New social movements are also novel in that they attract a disproportionately large number of highly educated, well-to-do people from the social, educational, and cultural fields—teachers, professors, journalists, social workers, artists, actors, writers—and student apprentices to these occupations. Such people are predisposed to participate in new social movements for several reasons. Their higher education exposes them to radical ideas and makes those ideas appealing. They tend to hold jobs outside the business community, which often opposes their values. And they often get personally involved in the problems of their clients and audiences, sometimes even becoming their advocates (Brint, 1984; Rootes, 1995).

Globalization Potential

Finally, new social movements possess more potential for globalization than old social movements did. In the 1960s, social movements were typically *national* in scope. That is why, for example, the intensity and frequency of urban race riots in the United States in the 1960s did not depend on such local conditions as the degree of black–white inequality in a given city (Spilerman, 1970, 1976). Instead, congressional and presidential action (and lack of action) on civil rights issues, national TV coverage of race issues, and growing black consciousness and solidarity helped to create the view among African Americans that racial problems are nationwide and can be solved only by the federal government.

Many new social movements that gained force in the 1970s increased the scope of protest still further. For example, members of the nuclear disarmament and environmental movements viewed federal legislation as a necessary but insufficient solution to the issues that troubled them. Once they recognized that, say, the condition of the Brazilian rainforest affects climatic conditions worldwide and that the spread of weapons of mass destruction can easily destroy all of humanity, movement activists pressed for international agreements binding all countries to stop environmental destruction and nuclear proliferation. Social movements went global.

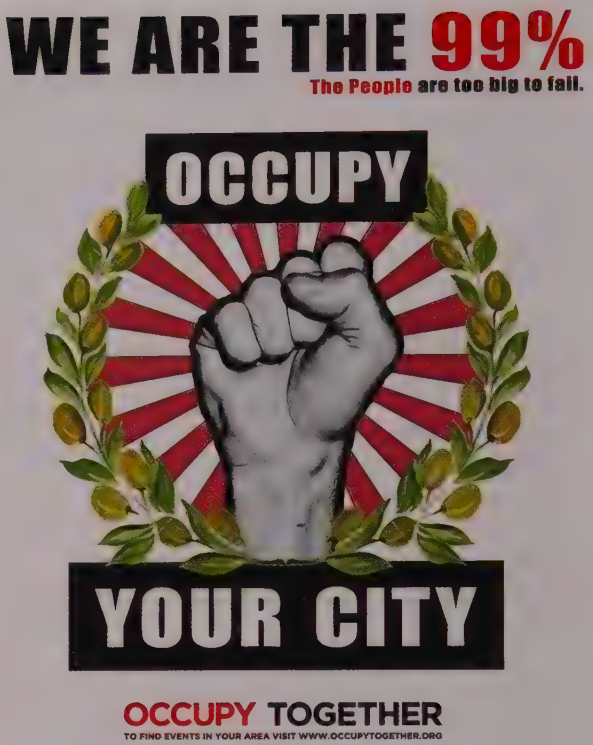
The globalization of social movements was facilitated by the ease with which people in various national movements could travel and communicate with like-minded activists from other countries. In the age of CNN, inexpensive jet transportation, email, and social media, it is possible not only to see the connection between apparently local problems and their global sources but also to act locally and globally. Greenpeace, for instance, is a highly successful environmental movement that originated in Vancouver in the mid-1970s and now has offices in 55 countries, with its international office in Amsterdam. A more

recent global initiative with roots in Vancouver was the Occupy Wall Street Movement.

On July 13, 2011, Kalle Lasn, editor of the Vancouver-based anti-consumerist magazine *Adbusters*, created a hashtag on Twitter, #OCCUPYWALLSTREET, and designed a poster of a ballerina dancing on the back of the bronze sculpture of a bull (symbolic of a profitable market) racing up Wall Street in Manhattan (Yardley, 2011). The poster called for people to go to the centre of the financial world and protest the growing wealth and greed of the richest 1 percent of society and their role in causing the world financial crisis of 2008–09. Thousands did, and within days, demonstrations and encampments were sprouting in cities around the world. It was the most remarkable evidence of the globalization of social movements ever observed.

Nearly one-half of the Occupy movement's encampments were closed by the end of 2011 with the remainder closing by May 2012 (St. John's, Newfoundland and Labrador, was the last holdout). Still, the Occupy movement succeeded in influencing global political discourse, at least for a time. One poll found that two-thirds of Americans surveyed in December 2011 believed that conflict between the rich and the poor was the main conflict in society—an increase of 19 percent since 2009 (Pew Research Center, 2012). However, the long-term influence of the movement remains unclear (see Critical Sociology: Democratic Cycles).

The globalization of social movements can be further illustrated by coming full circle and returning to the anecdote with which I began this chapter. In 1991, I visited my hometown. I had not been back in years. As I entered the city, I vaguely sensed that something was different. I could not define the change precisely until I reached the Irving pulp and paper mill. Suddenly, it became obvious: The rotten-egg smell was virtually gone. I subsequently discovered that in the 1970s a local woman whose son developed a serious case of asthma took legal action against the mill and eventually won. The mill owner was required by law to install a "scrubber" in the main smokestack to remove most of the sulfur dioxide emissions. Soon, the federal government was putting pressure on the mill owner to purify the polluted water that poured out of the plant and into the St. John River and the Bay of Fundy. Apparently, local citizens and the environmental movement had caused a change in the climate of opinion, influencing the government to force the mill owner to spend millions of dollars on a cleanup.


WE ARE THE 99%
The People are too big to fail.
OCCUPY
YOUR CITY
OCCUPY TOGETHER
TO FIND EVENTS IN YOUR AREA VISIT WWW.OCCUPYTOGETHER.ORG

A poster of the Occupy movement.
SOURCE: © Monica E/Occupy Together/www.occupytogether.org.

It took decades, but what was political heresy in 1968 eventually became established practice because environmental concerns had been amplified by the voice of a movement that had grown to global proportions. In general, as this case illustrates, globalization helps to ensure that many new social movements transcend local and national boundaries and that many of them—but, as you will now learn, not all—promote universalistic goals.

II. THE OTHER 85 PERCENT

With variations, the pattern of social movement evolution that I've sketched applies to the 20 or so rich countries of North America, Western Europe, Oceania, and Japan. As we have seen, social movements in these rich countries typically sought to broaden democracy through the expansion of citizenship rights. In contrast, social movements in the other 85 percent of the world (by population) developed differently. They focused less on broadening the bases of democracy than on ensuring more elemental human rights, notably freedom from colonial rule and freedom to create the conditions for independent economic growth.

Critical Sociology DEMOCRATIC CYCLES

The broadening of citizenship rights is by no means a steady process. Democratic reversals occur with some regularity when anti-democratic forces react against democratic advances. See Figure 15.6 for a graphic depiction of democratic surges and reversals over the past two centuries. As this figure shows, most white male property owners in the United States were permitted to vote in the 1828 presidential election. Over the next 93 years, the franchise was broadened geographically and socially, typically under pressure from social movements, notably the labour movement and the suffragette movement. Racial exclusion persisted in most jurisdictions.

The first phase of democratization ended abruptly in 1922, when Mussolini became Italy's leader. Stalin came to power in 1924 and Hitler in 1933. By 1942, two-thirds of the world's democracies had fallen under fascist or communist rule.

Allied victory in World War II returned democracy to many defeated countries, and anti-colonial movements brought democracy to Algeria, Tunisia, Morocco, Ghana, India, Burma, and Indonesia.

Beginning in 1959, military dictatorships took control of many countries in Southern and Eastern Europe, Latin America, Asia, and Africa. One-third of the world's democracies in 1958 were authoritarian regimes by the mid-1970s.

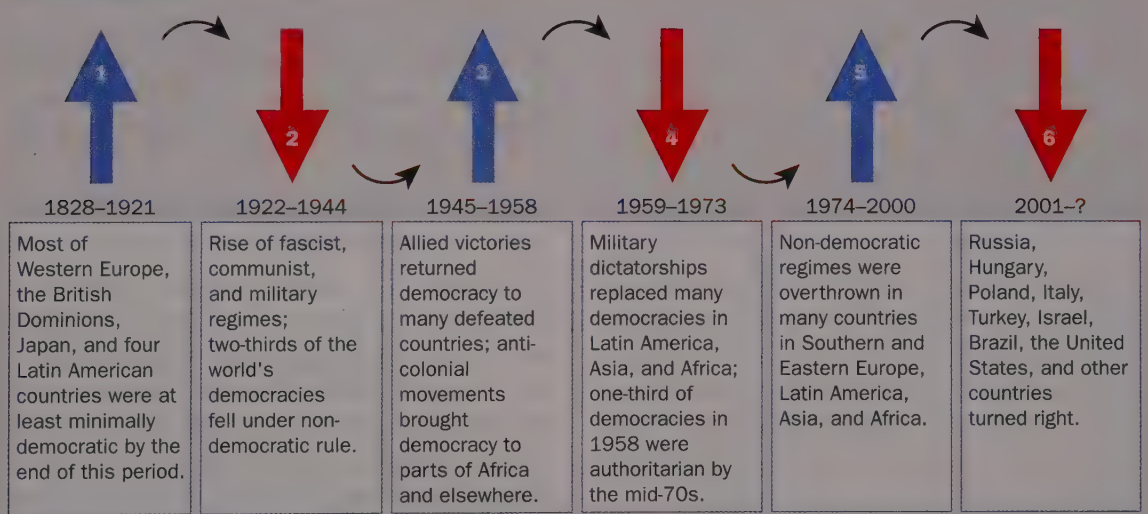
In 1974, an unexpected movement of civil resistance brought democracy back to Portugal. From 1974 to the end of the twentieth century, Spain, Greece, the entire Soviet bloc, Brazil, Argentina, and a whole series of countries in Africa and Asia were swept up in the biggest democratic wave ever. Social movements were the prime movers.

Finally, as the twenty-first century dawned, the democratic wave receded, as many countries turned sharply to the right.

Critical Thinking Questions

1. What factors caused the rise of right-wing governments in the first decades of the twenty-first century?
2. How might technology, notably social media, influence democratic cycles in the future?

FIGURE 15.6 Democratic Cycles


1
2
3
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6
1828–1921
Most of Western Europe, the British Dominions, Japan, and four Latin American countries were at least minimally democratic by the end of this period.
1922–1944
Rise of fascist, communist, and military regimes; two-thirds of the world's democracies fell under non-democratic rule.
1945–1958
Allied victories returned democracy to many defeated countries; anti-colonial movements brought democracy to parts of Africa and elsewhere.
1959–1973
Military dictatorships replaced many democracies in Latin America, Asia, and Africa; one-third of democracies in 1958 were authoritarian by the mid-70s.
1974–2000
Non-democratic regimes were overthrown in many countries in Southern and Eastern Europe, Latin America, Asia, and Africa.
2001–?
Russia, Hungary, Poland, Italy, Turkey, Israel, Brazil, the United States, and other countries turned right.

SOURCE: Robert Brym (2019: 2). "Social Movements and the Future of Canadian Society: An Introduction." In Robert Brym, ed. *Social Movements and the Future of Canadian Society.* Oakville, ON: Rock's Mills Press.

The other 85 percent of the world is relatively weak economically, politically, and militarily because it began substantial industrialization only after World War I and in some cases after World War II. This circumstance allowed the early industrializers (Britain, France, Japan, Russia, the United States, and so on) to carve up most of Asia, Africa, and South America into colonies, protectorates, mandates, spheres of

influence, and other forms of subjùgation. The nineteenth century was the age of imperialism. The early industrializers used the rest of the world as a captive market for their manufactured goods and a source of inexpensive raw materials and labour. They enriched themselves even as they limited economic growth and well-being in the less-developed countries (see Chapter 9, Development, Underdevelopment, and Globalization).

The Muslim World

Because events in the Muslim world were in many respects typical, they illustrate the problem well (Hourani, 1991: 265–349). Already by the 1830s, the armed forces of France had taken control of part of Algeria, those of Britain had taken control of part of the Arabian Peninsula, and those of Russia had taken over the Muslim lands of the Caucasus. A century later, almost the entire Middle East and North Africa were under British and French control. Egyptian cotton fed the looms of Lancashire. Iraqi oil supplied half of France's needs. British and French ships brought European machinery and textiles to the region. British and French financiers profited handsomely from their control of local banking. Some indigenous merchants and landowners benefited from the new economic relations too. However, the growing number of peasants and urban workers remained poor and almost powerless.

In the world's rich countries, an affluent and politically powerful class of merchants, industrialists, and financiers did much to promote the growth of democracy in its early stages (Moore, 1967). In contrast, in the Muslim countries and the rest of the less economically developed world, the bourgeoisie was small, weak, and dependent on imperial interests. Consequently, democratic ideals had little chance to sink deep roots. Where democratic movements emerged in less-developed countries, they often resisted imperial control, in which case rich imperial powers opposed them, sometimes militarily.

One of many examples that could be cited: In 1953, the democratically elected government of Iran wanted to assume greater control of its British-owned oil fields. The American CIA and Britain's MI-5 promptly engineered a violent government takeover by elements friendlier to Big Oil. Such European and (especially after World War II) American domination of less-developed countries bred much resentment, resistance, and revolt. Peasants, urban workers, intellectuals, and military officers were increasingly attracted to anti-imperialist independence movements based on various forms and mixes of socialism and nationalism (Brym, 1980: 50–53; Wolf, 1999 [1969]).

In the Muslim world, Islam was an additional source of anti-imperialist sentiment. In 1928, the Society of the Muslim Brothers was formed in Egypt ("Muslim Brotherhood Movement," 2002). It served as a prototype for other, similar groups. The Muslim Brotherhood argued against Western values and imperialist domination. It called for a return to the teaching of the Qur'an, strictly interpreted, and demanded that Egypt become an Islamic state based on religious law (*shari'a*). This type of thinking became popular in Egypt and throughout the Muslim world in the twentieth century, gaining impetus especially in Iran from the 1960s on and then spreading to Algeria and as far afield as Afghanistan and Sudan by the end of the century.

Growing popularity did not translate into widespread political ascendance until recent times. After World War II, almost all Middle Eastern and North African countries were authoritarian regimes that suppressed the Muslim Brotherhood and forced it underground. There, it branched into two streams—an extremist current exemplified by al Qaeda and a more liberal current exemplified by political parties that a plurality of Tunisians, Moroccans, and Egyptians supported in national elections held in 2011 and 2012. Let us consider each of these currents in turn.

Extremist Political Islam: From al Qaeda to ISIL

A clear line of intellectual influence leads from the early Muslim Brothers to the assassins of Egypt's President Anwar Sadat in 1981 after he made peace with Israel to Osama bin Laden and al Qaeda (Worth, 2001). Al Qaeda's chief aims are to remove all Western influence from areas with Muslim majorities, create in their place societies based on a fundamentalist interpretation of Islamic law, and destroy Israel as a Jewish state.

It is noteworthy that, however much al Qaeda is influenced by ideas dating back to the 1920s, it is every inch a global movement that relies on modern technology for its successes. Al Qaeda has operatives throughout the world. It finances itself through a complex international network of legitimate businesses, charitable and relief organizations, private

donors, and opium trafficking operations (Shahar, 2001). Bin Laden communicated with his operatives via satellite telephone until U.S. law enforcement authorities inexplicably revealed they were tapping calls from his base in Afghanistan. Once he learned of these taps, he increased his use of another, more effective means of global communication—sending messages that are easily encrypted but difficult to decode via the Internet (Kelley, 2001; McCullagh, 2000).

Some analysts think such messages were used to help plan and coordinate the complex, virtually simultaneous jet hijackings that resulted in the crash of an airliner in Pennsylvania and the destruction of the World Trade Center and part of the Pentagon on September 11, 2001, killing some 3000 people.

In the summer of 2014, a still more violent and extreme offshoot of al Qaeda known as the Islamic State in Iraq and the Levant (ISIL) emerged on the international scene. Well financed, heavily armed, and well trained, it had already taken over large parts of Syria, which was in the midst of a civil war. It now raced across eastern and northern Iraq, shooting, raping, torturing, beheading, and crucifying Christians, Muslims, and others—in fact, anyone who was not prepared to convert to its extremist views. As of this writing (fall 2019), ISIL has been largely subdued in Iraq and Syria, but many of its surviving operatives are fanning out to Western Europe, North Africa, and elsewhere.

Now let's turn to political Islam's second tendency.

Liberal Political Islam: From Arab Spring to Arab Winter

In late 2010, Mohamed Bouazizi, a 27-year-old Tunisian street vendor, set himself on fire to protest harassment and humiliation by local officials. His action catalyzed widespread and often violent anti-regime, pro-democracy demonstrations that first overthrew the Tunisian government and then spread with similar results to Egypt, Libya, and Yemen while also rocking other governments throughout the region. Bouazizi and those inspired by him objected to the authoritarianism, corruption, economic stagnation, unemployment, and poverty that characterizes most of the Middle East and North Africa. They initiated a pro-democratic movement that was soon dubbed the "Arab Spring."

Although the prospects for democracy in the region at first seemed bright, things did not work out as widely expected. Four distinct political patterns emerged:

1. *Monarchical steadfastness.* Eight countries containing 24 percent of the Arabs in the Middle East and North Africa are authoritarian monarchies (Bahrain, Jordan, Kuwait, Morocco, Oman, Qatar, Saudi Arabia, and the United Arab Emirates). Although some of these regimes found it necessary to use their security forces to suppress pro-democracy protests, the most powerful anti-democratic weapon that most of them enjoy is oil wealth. Most of the monarchies have, in effect, been able to stay in power by buying off their populations with heavily subsidized food and fuel and relatively high incomes.
2. *Civil war.* Another 24 percent of the region's Arabs live in Iraq, Libya, Syria, and Yemen. Beginning in 2011, these countries descended into civil wars that, in most cases, are still ongoing as of this writing (fall 2019). Democratic, authoritarian, and Islamist forces, some affiliated with al Qaeda or ISIL, are contending for power in these countries.
3. *Reform and reaction.* In a free and fair vote in 2012, the people of Egypt, representing 23 percent of the region's Arabs, elected a political party associated with the Muslim Brotherhood. The party was unlike anything most Westerners had ever seen. On the one hand, it was suspicious of Western intentions and insisted that Islam form the basis of politics and law. On the other hand, it repeatedly proclaimed support for democratic elections and tolerance of religious and ethnic minorities. In practice, the Islamist tendencies of the party won out, and many liberal, secular, and Christian Egyptians took to the streets to protest. The country's powerful military soon stepped in and took over the government, returning Egypt to its political condition before the Arab Spring.
4. *The Tunisian model.* Tunisia is a North African country with a population of less than 11 million, representing just 4 percent of the region's Arabs. In 2011, Tunisians elected to office a party affiliated with the Muslim Brotherhood. Less Islamist and more democratic than its Egyptian counterpart, the party was defeated by a more liberal and secular party in the 2014 election. In Tunisia, the Arab Spring lives, although there are signs that, even there, democracy is

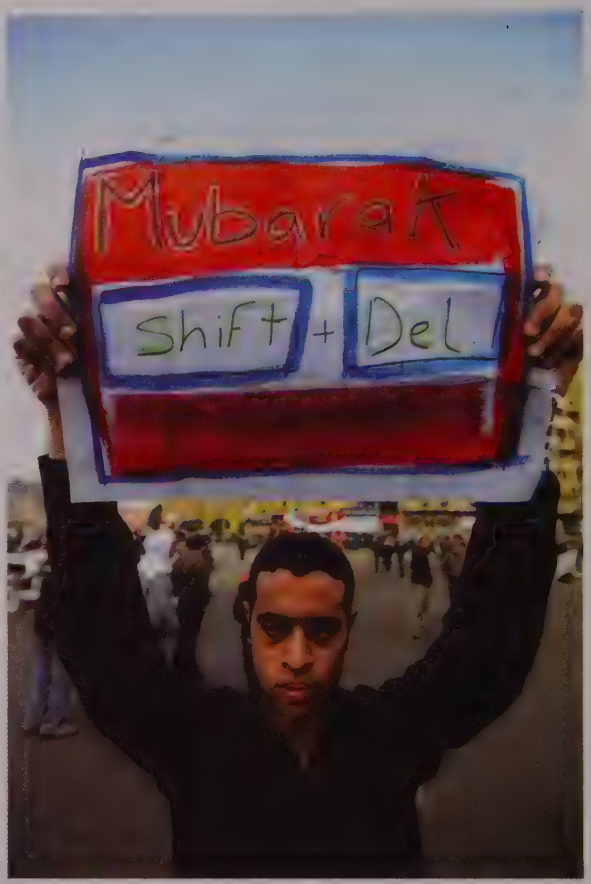
endangered by economic stagnation, terrorist attacks, and political conflict (Andersen and Brym, 2017; Brym and Andersen, 2016). In the rest of the region, the Arab Spring has turned into the Arab Winter.

Will the Revolution Be Tweeted?

One of the most interesting sociological issues elicited by the Arab Spring concerns the question of whether Twitter and Facebook made the uprising possible. These social media platforms allowed Arab protesters not just to express their grievances locally, regionally, and globally, but also to coordinate their actions. In this view, social media enabled movement members to develop their ideas, inspire others, mobilize political and financial support, organize demonstrations, and warn comrades of imminent danger at the neighbourhood level, all at low cost. Parallels are sometimes drawn between the Arab Spring and other new social movements that have used social media to good effect, such as the Occupy movement, which spread quickly to 951 cities in 82 countries.

Despite the advantages of using social media to mobilize protest, one must be careful not to exaggerate their benefits. For example, survey research among a representative sample of Egyptian Arab Spring activists paints a subtler picture. While using new electronic communications media was associated with being a demonstrator, other factors were more important in distinguishing demonstrators from mere sympathetic onlookers. Protesters tended to be people with stronger grievances about unemployment, poverty, and corruption. They were more available for protest activities than others were because they tended to be unmarried men living in cities. And they tended to have more and stronger pre-existing ties than others did to various charities, political groups, and other civic associations. In short, the use of new electronic communications media was less important than were strong grievances, high availability, and dense social connections in distinguishing demonstrators from sympathetic onlookers (Brym et al., 2014).

In sum, as recent events in the Middle East and North Africa illustrate, a wide range of reactions against Western power and influence now grips much of the developing world. In its extreme forms, the anti-Western reaction has no respect for minority rights, multiculturalism, elections, relatively open markets, and many of the other freedoms we enjoy and often take for granted in the West. In its more moderate forms, it shares many of the West's fundamental values. Yet, regardless of its orientation, the anti-Western reaction is everywhere based on the desire of people to restore the independence and dignity they lost when the industrialized world showed up on their doorstep uninvited.



A protester in Tahrir Square, Cairo, Egypt, in 2011, helping to overthrow the authoritarian regime of President Hosni Mubarak.
SOURCE: © Patrick Baz/Getty Images.

One of the great tasks the West faces in the twenty-first century is to defend itself against violence while doing its utmost to remove the ultimate source of that violence: the gap between rich and poor countries that opened at the time of the Industrial Revolution and that has widened ever since. Whether we are up to the task is anyone's guess.

TIME FOR REVIEW

1. How and why have social movements changed over the past three centuries?
2. What are the main differences between social movements in rich and developing societies?

SUMMARY

1. **What is democracy and what determines the level of democracy in a society?**
   Democracy involves a two-way process of control between the state (the set of institutions that formulate and carry out a country's law, policies, and binding regulations) and civil society (the private sphere, consisting of social movements, political parties, the mass media, and so on). The level of democracy in a society depends on the capacity of civil society to influence the state through citizen support of social movements, political parties, and other groups. That capacity increases as power becomes more widely distributed in society.

2. **What are the main ideas and criticisms of pluralists, elite theorists, Marxists, power-balance theorists, and state-centred theorists?**
   Although pluralists correctly note that democratic politics is about negotiation and compromise, they fail to appreciate how advantaged groups tend to have more political influence than others do. Although elite theorists are right to note that power is concentrated in the hands of advantaged groups, they fail to appreciate how variations in the distribution of power influence political behaviour and public policy. Marxists assert that, in capitalist societies, elites always form a ruling class, but power-balance theorists focus on the political effects of *changes* in the distribution of power in society. However, power-balance theorists fail to appreciate that state institutions and laws also affect political behaviour and public policy, as state-centred theorists emphasize.

3. **How does the distribution of power in society affect the success of particular political parties?**
   The degree to which power is widely distributed influences the success of particular kinds of parties and policies. Widely distributed power is associated with the success of labour parties and policies that redistribute wealth.

4. **Under what circumstances do people rebel against established authority?**
   Research does not support the view that social movements emerge when relative deprivation spreads. Research suggests that people are more inclined to rebel against the status quo when they are bound by close social ties to many other people who feel similarly wronged and when they have the money and other resources needed to protest.

5. **What is frame alignment?**
   For social movements to grow, members must engage in frame alignment, making the activities, goals, and ideology of movements congruent with the interests, beliefs, and values of potential new recruits.

6. **How can the history of democracy be characterized in terms of citizenship rights?**
   The history of democracy is a struggle for the acquisition of constantly broadening citizenship rights—first the right to free speech, freedom of religion, and justice before the law, then the right to vote and run for office, then the right to a certain level of economic security and full participation in the life of society, and finally the right of marginal groups to full citizenship and the right of humanity as a whole to peace and security.

7. **What is the chief focus of social movements in the developing world?**
   In the developing world, social movements have focused less on broadening the bases of democracy than on ensuring more elemental human rights, notably freedom from colonial rule and freedom to create the conditions for independent economic growth. In some cases, these movements have taken extreme, anti-democratic forms.

QUESTIONS TO CONSIDER

1. Have you ever participated in a social movement or been actively involved in a political party? If so, explain how your political choices (which party you joined, your level of participation, the timing of your recruitment) were influenced by the sociological factors discussed in this chapter. If you have never participated in a social movement or been actively involved in a political party, explain how the sociological factors discussed in this chapter influence you to remain politically inactive.
2. How would you achieve a political goal? Map out a detailed strategy for reaching a clearly defined aim, such as a reduction in income tax or an increase in university funding. Whom would you try to recruit to help you achieve your goal? Why? What collective actions do you think would be most successful? Why? To whose attention would these actions be directed? Why? Write a manifesto that frames your argument in a way that is culturally appealing to potential recruits.
3. Do you think that social movements will be more or less widespread in the twenty-first century than they were in the twentieth century? Why, or why not? What kinds of social movements are likely to predominate?
4. Do you think that the twenty-first century will be more or less democratic than the twentieth century? Why, or why not?

GLOSSARY

Authorities (p. 343) are people who occupy the command posts of legitimized power structures.

Authority (p. 343) is power that is widely viewed as legitimate.

Civil citizenship (p. 355) recognizes the right to free speech, freedom of religion, and justice before the law.

Civil society (p. 344) is the private (nonstate) sphere of social life.

Elite theory (p. 345) maintains that well-to-do people consistently have more political influence than people who are less well-to-do have and that society is therefore not as democratic as it is often portrayed.

Force (p. 343) is coercive power.

Frame alignment (p. 354) is the process by which individual interests, beliefs, and values become congruent and complementary with the activities, goals, and ideology of a social movement.

New social movements (p. 355) are post-1950s movements that attract a disproportionately large number of highly educated people in the social, educational, and cultural fields and universalize the struggle for citizenship.

Pluralist theory (p. 345) holds that society has many competing interests and centres of power and that no one interest or power centre predominates in the long run.

Political citizenship (p. 355) recognizes the right to run for office and vote.

Political parties (p. 343) are organizations that seek to control state power.

Power (p. 343) is the ability of an individual or a group to impose its will on others, even if they resist.

Power-balance theory (p. 348) suggests that social movement formation and success depend on how powerful authorities are, compared with partisans of change. It also holds that societies with widely distributed power are more democratic and more egalitarian than are societies with narrowly held power.

Relative deprivation (p. 352) is an intolerable gap between the social rewards people feel they deserve and the social rewards they expect to receive.

Resource mobilization theory (p. 352) holds that social movements crystallize and succeed in achieving their goals to the degree that they have access to scarce resources, such as money and effective communication facilities.

A **ruling class** (p. 346) is a self-conscious and cohesive group of people, led by corporate executives and owners of big business, who act to advance their common interests.

Social citizenship (p. 355) recognizes the right to a certain level of economic security and full participation in social life.

Social movements (p. 343) are enduring collective attempts to change part or all of the social order by means of rioting, petitioning, striking, demonstrating, and establishing pressure groups, unions, and political parties.

The **state** (p. 344) is a set of institutions that formulate and implement a country's laws, policies, and binding regulations. It consists of an executive branch (which initiates laws), a legislative branch (which makes laws), a judicial branch (which interprets laws), and an administrative and coercive apparatus (which enforces laws and protects state security).

State-centred theory (p. 350) shows how the state structures political life independently of the way power is distributed among classes and other groups at a given time.

Universal citizenship (p. 357) recognizes the right of marginal groups and the rights of humanity as a whole to full citizenship.

NOTES

1. In addition, less than 11 percent of the American working class is unionized, making it the least organized working class in any of the world's rich countries. And laws in many states prevent convicted felons from voting *for life*, which means that nearly 8 percent of black Americans are disenfranchised. (A felony is typically a crime involving violence and punishable by a minimum of one year in prison.)
2. For example, in the 1890s, a coalition of white and black southern farmers threatened the established American political parties. It was precisely for this reason that American electoral laws were made more restrictive.
3. Some of these generalizations do not apply to countries with a long tradition of labour government. For example, since World War II, Sweden has experienced high levels of unionization and low strike rates. That is because Swedish workers and their representatives are involved in government policymaking. Decisions about wages and benefits tend to be made in negotiations among unions, employer associations, and governments rather than on the picket line.

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CHAPTER 15

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